Award winning systems for fast moving businesses

WebFastTrack
FOI Request Tracker System
User Manual

Award winning systems for fast moving businesses

Table Of Contents

1 FOI SYSTEM OVERVIEW AND AIMS 4

2 SEARCHING FOR CONTACTS 5

2.1 MAIN SCREEN OVERVIEW 5
2.2 UNDERSTANDING CONTACT DATA 5
2.3 SEARCH CRITERIA 6
2.3.1 Searching for Organisations 6
2.3.2 Searching for Addresses 6
2.3.3 Searching for Contacts 7
2.3.4 Combining Search Criteria 7
2.3.5 Excluding Criteria 7
2.3.6 Refining Criteria 8
2.3.7 Saving a Search 8
2.4 DISPLAYING DETAILS 9
2.5 ADDING NOTES 10
2.6 ATTACHING A FILE 11
2.7 VIEWING LINKED EMAILS 11
2.8 ADDING NEW ORGANISATIONS/SITES/CONTACTS 12
2.9 ADDING A NEW INDIVIDUAL 14
2.10 SETTING LOOKUPS 14
2.11 SEARCHING LOOKUPS 15

3 INFORMATION REQUESTS 16

3.1 OVERVIEW OF THE INFORMATION REQUEST MODULE 16
3.2 ADDING AN INFORMATION REQUEST 16
3.3 VIEWING INFORMATION REQUESTS 17
3.4 SEARCHING FOR INFORMATION REQUESTS 18

4 ACTIVITIES 20

4.1 OVERVIEW 20
4.2 ADDING AN ACTIVITY 20
4.3 VIEWING ACTIVITIES 21
4.4 SEARCHING FOR ACTIVITIES 21

5 ATTACHING FILES 21

5.1 OVERVIEW 21
5.2 ADDING A FILE 22
5.3 VIEWING ATTACHED FILES 22

6 WRITTEN COMMUNICATIONS 22

6.1 OVERVIEW OF (E-)CORRESPONDENCE 22
6.2 PRODUCING A LETTER 22
6.3 PRODUCING A MAILSHOT 23
6.4 EMAILSHOTS 26

7 REPORTS 29

7.1 OVERVIEW 29
7.2 REPORTS MENU 29
7.2.1 Information Request Date Raised Report 30
7.2.2 Information Request Cost Report 31
7.2.3 Information Request Number of Days to Resolve Report 31
7.2.4 Information Request Ongoing or Overdue Report 32
7.2.5 Public disclosure Log 32

8 ADMINISTRATION OF THE SYSTEM. 34

8.1 EMPLOYEE ADMIN 34
8.2 DOCUMENT TEMPLATE ADMIN 35
8.3 WEB ENTRY ADMIN 35
8.4 LABELS 35

8.5 DROP DOWNS 36

9 SECTION ON THE INFORMATION REQUEST MANAGER'S PORTAL..... 36

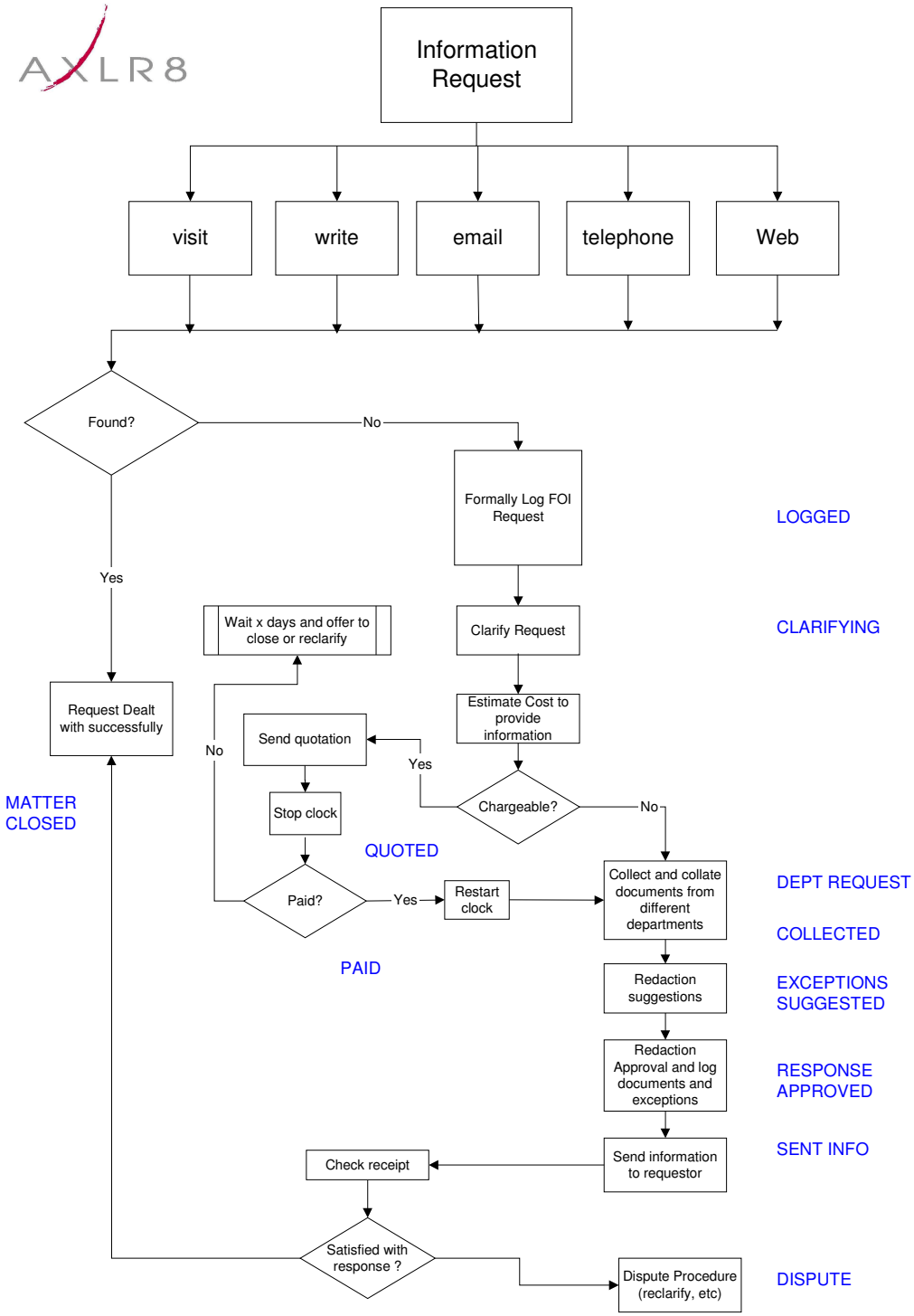
9.1 LOGGING IN 36
9.2 LIST OF JOBS/"INFORMATION REQUESTS" (OPEN, CLOSED, ALL) 37
9.3 CREATING NEW CONTACTS AND LOGGING NEW INFORMATION REQUESTS 37
9.4 LOOKING AT OTHER COLLEAGUES' LISTS 39
9.5 SEARCHING FOR PREVIOUS ANSWERS..... 39

Award winning systems for fast moving businesses

Award winning systems for fast moving businesses

1 FOI system overview and aims

The system is designed to deal with Information requests in a timely and effective fashion. Timely because the law states that the requests we put in as citizens should be answered within certain defined timescales. The system helps effectiveness and efficiency – for example you can refer to previous answers to answer current requests more quickly and people are provided with reports ad reminders. Below is a diagram of how an Information Request such as and FOI request might be dealt with.



The Tracker system enables local authority employees to log Information Requests, pass them to colleagues in other departments, while monitoring their progress, add

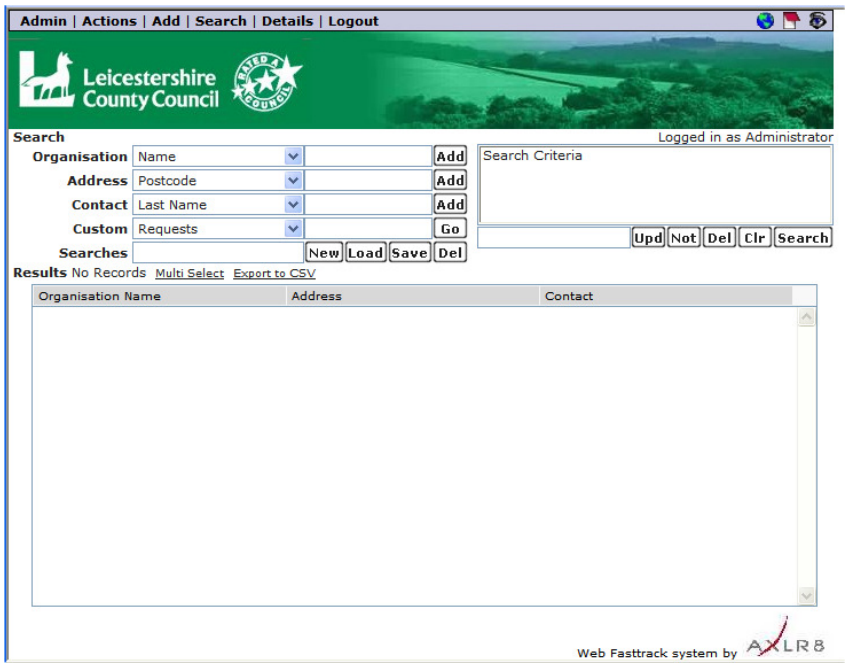
notes and files to the requests, mail merge template responses for the regular requests, and finally close them. A countdown starts as the request is logged. Email triggers can be automated at times defined by the System Administrator.

> NB In this manual, the expression (**System) Administrator** refers to one or more senior managers who directly or by delegation set the business rules up within the system and change them from time to time.

2 Searching for contacts

2.1 Main screen Overview

You will be provided with a log in *username* & *password* and the web address for your organisation. Once logged on successfully, the main screen is presented.



Information Requests might be submitted by either an Organisation or a member of the public. The system allows for creation of both these types of "Requestor". This screen allows one to search for both businesses and contacts. *Criteria* are entered in the *search* fields by *Organisation* or Contact, or a combination of these, or by *Address Details*. each criterion is added to the *Criteria* panel in the top right of the screen. The Search results are displayed in the wide panel below.

The horizontal menu across the top of screen gives fast access to the many tools within the system via customisable drop down menus. The 3 icons in the top right of the screen are shortcuts to details, notes and lookups.

2.2 Understanding Contact Data

Within AXLR8 Request Tracker system, customer data is hierarchical. Organisation is the top level. An organisation can have many sites, and a site can have many contacts.

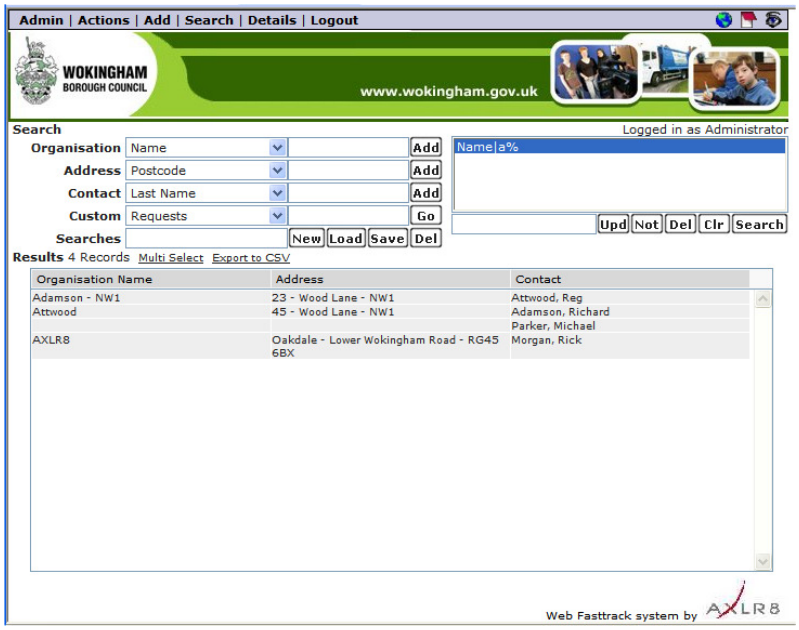
Notes can be kept at any of the 3 levels. *Lookups* (user-defined data) add to the profile. Emails, if tracked through the system, can be viewed, as can call history. Files can be attached to build a complete picture of a contact.

Award winning systems for fast moving businesses

2.3 Search Criteria

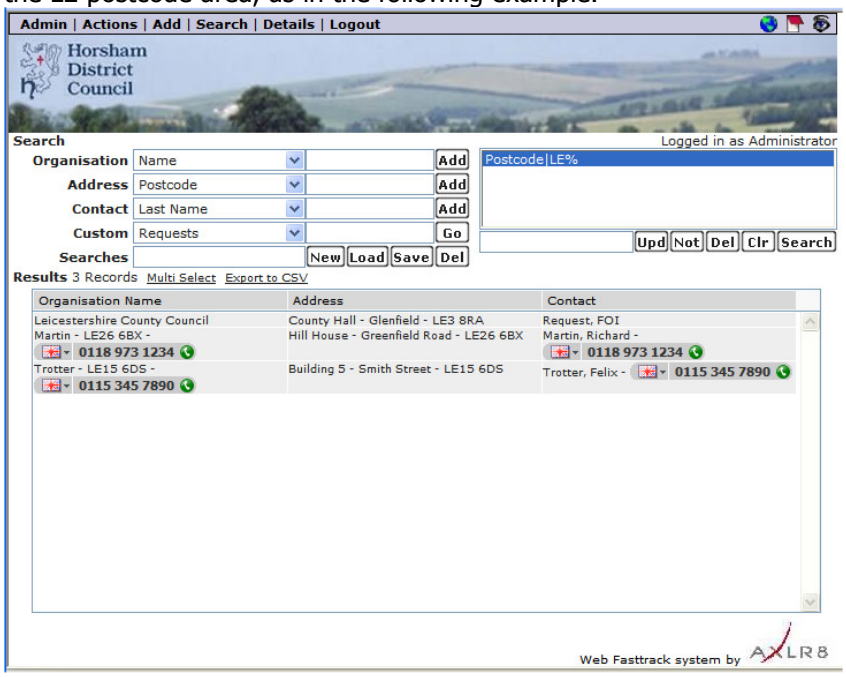
2.3.1 Searching for Organisations

Enter the initial letter(s) of the required Organisation into the field to the right of Organisation, with Name selected from the drop down list, and click *Add* to add it to the Search Criteria. Then click on *Search*. In the example below, all organisations have been found starting with the letters "A"



2.3.2 Searching for Addresses

To find all organisations in a specific postcode area, enter as much of the postcode as possible into the field to the right of Address, with Postcode selected from the drop down list, and click *Add* to add it to the Search Criteria. Then click on *Search*. For example, enter "LE" in the postcode field and click on *Search* to find all organisations in the LE postcode area, as in the following example.

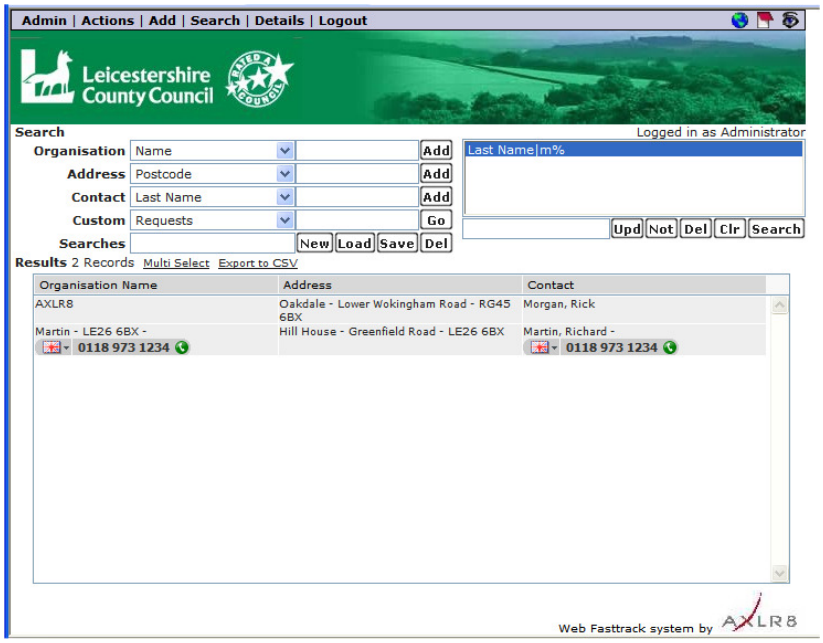

Admin | Actions | Add | Search | Details | Logout
Horsham District Council
Search
Logged in as Administrator
Organisation Name Add
Address Postcode Add
Contact Last Name Add
Custom Requests Go
Searches New Load Save Del
Postcode|LE%
Upd Not Del Clr Search
Results 3 Records Multi Select Export to CSV
Organisation Name
Address
Contact
Leicestershire County Council
Martin - LE26 6BX -
0118 973 1234
County Hall - Glenfield - LE3 8RA
Hill House - Greenfield Road - LE26 6BX
Request, FOI
Martin, Richard -
0118 973 1234
Trotter - LE15 6DS -
0115 345 7890
Building 5 - Smith Street - LE15 6DS
Trotter, Felix -
0115 345 7890
Web Fasttrack system by AXLR8

Award winning systems for fast moving businesses

Award winning systems for fast moving businesses

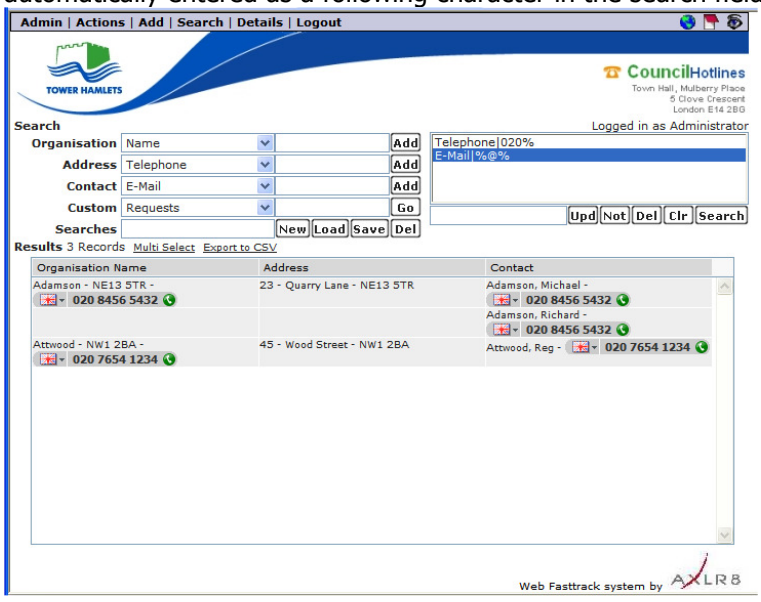
2.3.3 Searching for Contacts

Contact data is searched in the same way. All contacts with a last name "Smith" can be found by entering "Smith" in the field to the right of the contact field, ensuring Last Name is selected from the drop down list. In the following example, all contacts with a last name starting with "M" have been found.



2.3.4 Combining Search Criteria

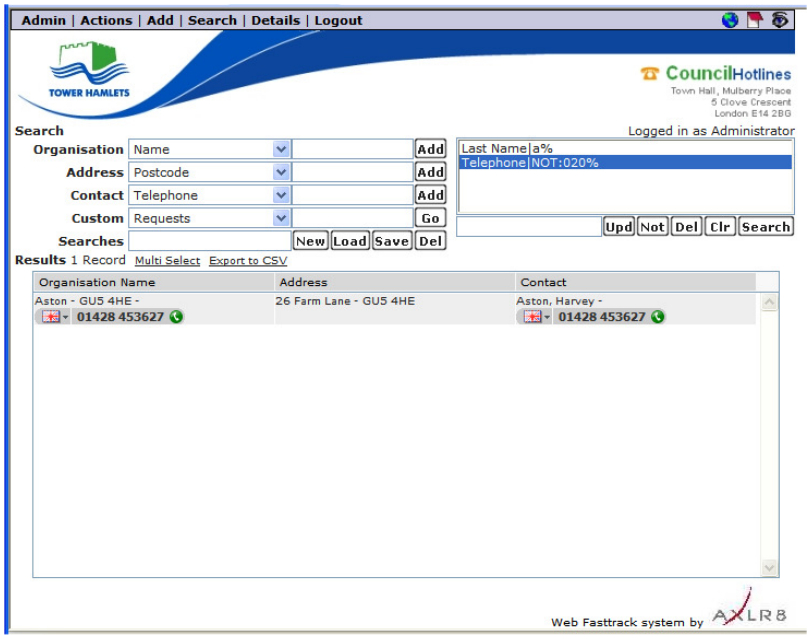
Combinations of criteria can also be specified. In the following example all contacts have been found in the 020 telephone area who also have an e-mail address. This is achieved by selecting "Telephone" from the Address drop down menu and entering 020 as the criteria, and selecting Email from the Contact drop down menu and entering "%@" as the criteria. The "%" acts as the wildcard within the system and is automatically entered as a following character in the search field.



2.3.5 Excluding Criteria

To further refine searches, data can be excluded from the criteria. If, for example, all Contacts with last names beginning with "A" were to be searched but all those within

the "020" telephone area were to be excluded, then once "020" had been entered as search criteria it must be highlighted within the search criteria panel and then click the **Not** button. The criteria selection will appear as in the example below.



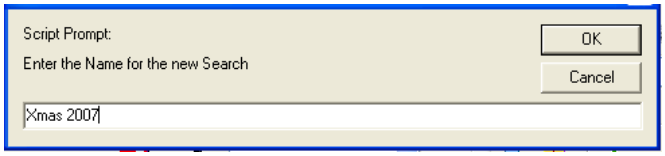
2.3.6 Refining Criteria

When criteria are entered incorrectly, click the appropriate entry within the *Criteria* panel and click the **Del** button below. This will remove the one entry from the panel. To remove all entries, click **Clr** ready to start a new search. To amend any search criteria, double click the entry in the *Criteria* panel. It will then appear in the field below. Make the amendment and click **Upd**. The revised criteria will be substituted in the Criteria panel.

More complex searches can be carried out using lookups, and for calls within the *Call Centre*, but these are not within the scope of this manual.

2.3.7 Saving a Search

When a particularly complex search has been carried out involving many criteria, which may also be reusable, it is possible to save the search and reload it at a later date. In the following example, four sets of criteria have been defined using lookups and the "**Not**" functionality. To save this search, click **Save** to the right of the *Searches* field. A prompt screen will appear.



Enter the name of the saved *Search* and click OK.

To use the *Search* again, click Load to the right of the *Searches* field and a prompt screen will appear.

Award winning systems for fast moving businesses

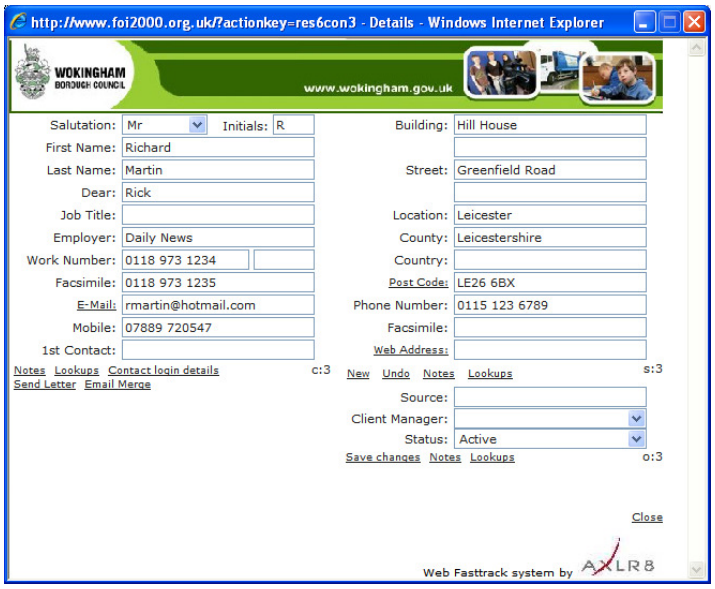
Use the drop down list to select the name of the required saved *Search* and click **Load**. The criteria set will be imported into the Criteria panel. This can then either be amended or click **Search** to run the *search* again.

2.4 Displaying Details

The results of a *search* are displayed in the lower half of the screen in the *results* panel. More details of the organisation, site and contact can then be displayed. This is achieved by either:

- Double clicking on the required data
- Clicking on the required data to underline it and then clicking on *Actions* on the top horizontal menu and selecting Details from the drop down list
- Clicking on the required data to underline it and then clicking on the *Details* shortcut (the *Globe*) in the top right corner of the screen

In the following example, a contact has been selected and the *Details* are displayed.



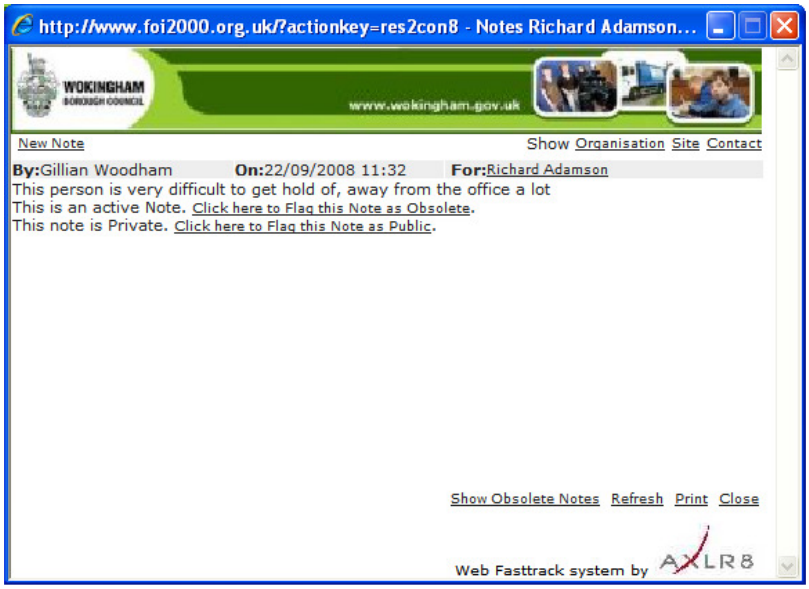
When a contact is selected, as in this case, Organisation and Site details are also displayed. When a Site is selected, Organisation details are also displayed, and when an Organisation is selected, only the organisation details are displayed.
In the case of an individual, the organisation is created as a unique deduplication identifier using a combination of surname and postcode (but some times configured in larger fast moving B2C systems to include telephone number(s) and email addresses to define an individual or family)
From this screen, any of the details can be updated and saved.

AXLR8
tfm AWARDS 2007
BCS 2006 IM AWARDS
dti COMMERCE AWARDS 2005
Award winning systems for fast moving businesses

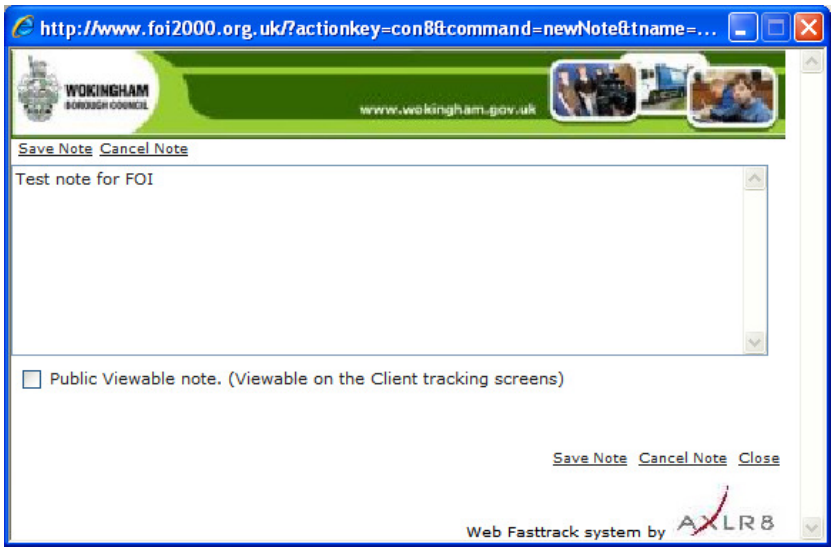
2.5 Adding Notes

From this screen also, *notes* can be added. Notes are stored at Organisation, Site, and Contact level. If notes are made on a Contact, they can also be viewed at Site and Organisation level. If notes are made on a Site level, they can also be viewed at Organisation level, but if notes are made on an Organisation, they are only viewed at Organisation level.

The method to add a *Note* is the same whether on a Contact, Site or Organisation. Either click on the required Contact, Site or Organisation on the *Results* panel, select *Details* from the top horizontal menu and click on *Notes* from the drop down list. (Shortcut: Click the *Notes* icon in the top right of the screen) An alternative method is to click on the Notes link below either the Contact, Site or Organisation on the Details panel, as displayed above. The *Notes* panel appears.


http://www.foi2000.org.uk/?actionkey=res2con8 - Notes Richard Adamson...
WOKINGHAM BOROUGH COUNCIL
www.wokingham.gov.uk
New Note
Show Organisation Site Contact
By:Gillian Woodham On:22/09/2008 11:32 For:Richard Adamson
This person is very difficult to get hold of, away from the office a lot
This is an active Note. Click here to Flag this Note as Obsolete.
This note is Private. Click here to Flag this Note as Public.
Show Obsolete Notes Refresh Print Close
Web Fasttrack system by AXLR8

In the example above, there is already a note on the selected contact. Each note gives the name of the author (i.e. the login name) and is date & time stamped. To add a further note, click the **New Note** link. The screen clears ready for the new note to be entered.

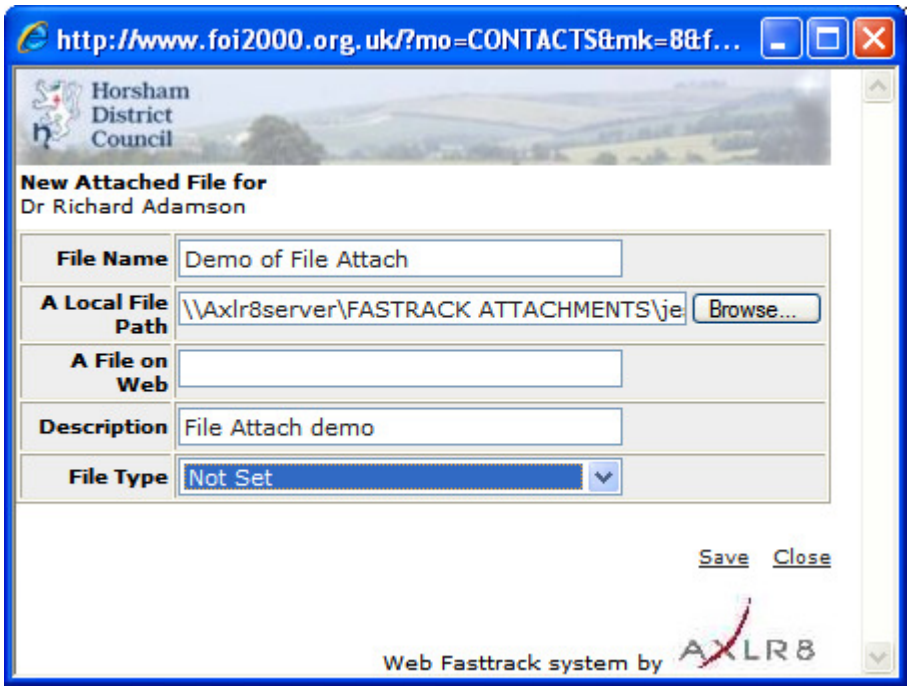

http://www.foi2000.org.uk/?actionkey=con8&command=newNote&tname=...
WOKINGHAM BOROUGH COUNCIL
www.wokingham.gov.uk
Save Note Cancel Note
Test note for FOI
Public Viewable note. (Viewable on the Client tracking screens)
Save Note Cancel Note Close
Web Fasttrack system by AXLR8

If the note is to be viewed on the public portal, check the Public Viewable tickbox, else if solely for Local Authority viewing, leave this box unchecked. Click **Save Note**. Notes can never be amended or deleted once saved.

Award winning systems for fast moving businesses

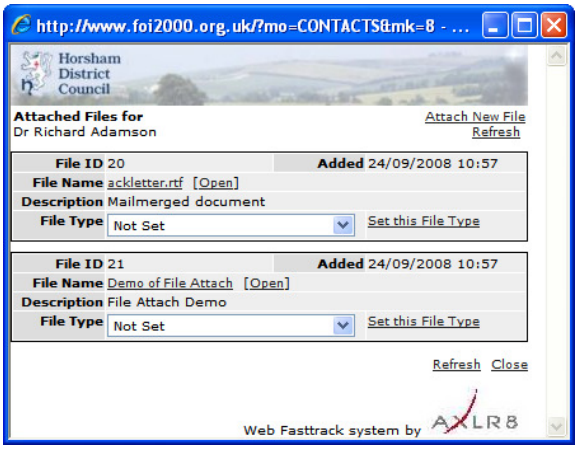
2.6 Attaching a File

Files can be attached to Contacts, Sites, and Organisations. To attach a file to a Contact, the appropriate contact must be selected on the *Results* panel. With the Contact name underlined, click **Add** on the top horizontal menu and select **New File** Attach from the drop down list. The **New Attached File** screen appears as in the example below.



Browse for the required file on the local network or enter a URL for a file on the internet. On clicking **Save**, a message will appear warning that the file is being uploaded.

On completion, a list of all files attached to the Contact is displayed.



To view files attached to a contact, select the contact from the *Results* panel and, with the contact name underlined, click **Details** from the top horizontal menu, and then **Files** from the drop down list. The screen above is displayed. Display the file by clicking the filename.

More information on *File Attach* is given in a later section of this manual.

2.7 Viewing Linked Emails

To further enhance the contact profile, all emails to and from any contact can be viewed, as long as the MessageStore has been created by AXLR8. This is true even

Award winning systems for fast moving businesses

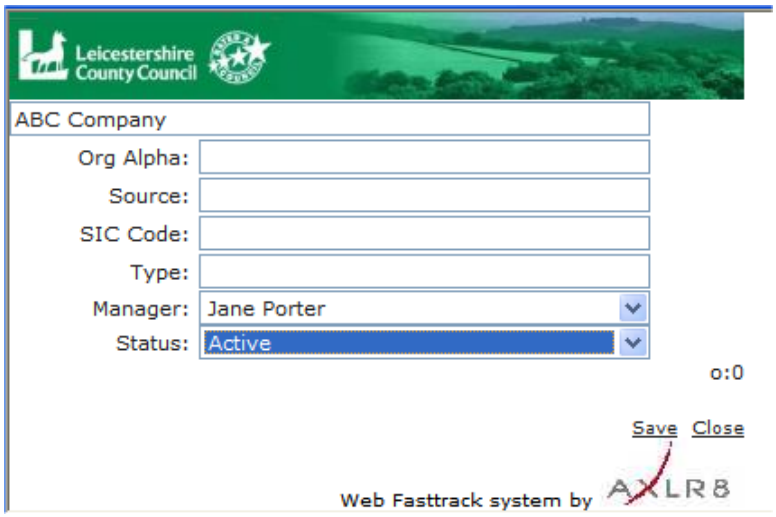
when the emails have been deleted from the employee's Inbox in Outlook (or any other mail client) or Exchange (or any other mail server). Select the Contact from the *Results* panel and, once underlined, click Details on the top horizontal menu and select Emails from the drop down list.

For more details of this option, please visit www.ExchangeVault.co.uk.

Please consider whether you allow access to emails by all staff?

2.8 Adding New Organisations/Sites/Contacts

To add a new Organisation, click Add on the top horizontal menu and select New Organisation from the drop down list. The following screen will appear.



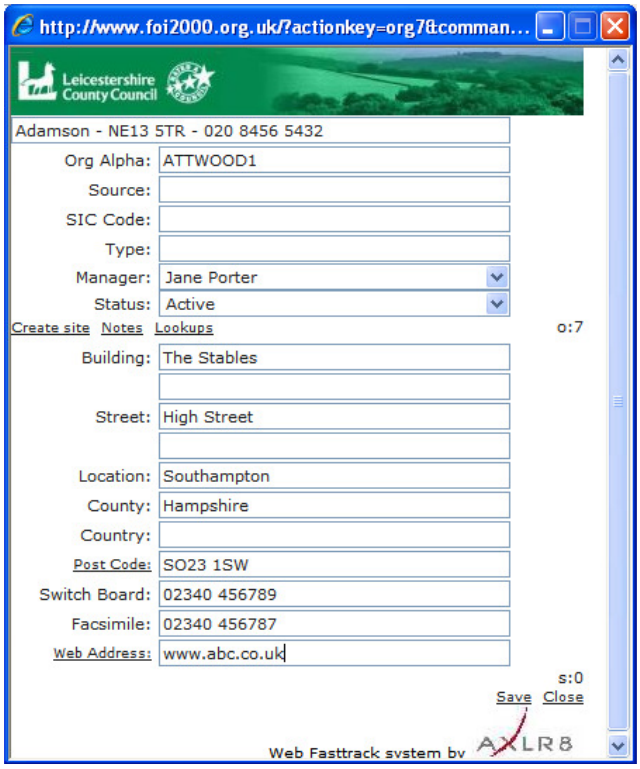
Enter the Organisation name in the top field. The subsequent fields may not be required for a Local Authority. The *Source* field is for the origin of the lead; double click within the field to select from options or add a new value.
Double click within the *SIC code* field to select a value.
Double click within the *Type* field to select a value.
Select a *Request Manager* from the drop down list. Click Save. This mighy only be used in circumstances where, for example the organisation is the local newspaper and their first and final point of contact must always be the press officer.

A new Site can now be added to this Organisation by clicking on the **Create Site** link. If a new Site is to be added to a different Organisation, then that Organisation must first be selected from the Results panel and the *Details* selected.

Complete the details as in the example below and click **Save**.

Award winning systems for fast moving businesses

Award winning systems for fast moving businesses



Clicking on the **Postcode** link will display maps.google.com for the postcode area in a browser window. Clicking on the **Web Address** link will display the Organisation's website in a browser window.

A new Contact can now be added to this Site by clicking on the **Create Contact** link. If a new Contact is to be added to a different Site, then that Site must first be selected from the Results panel and the Details selected. For example, you may want to add three reporters at the local paper.

Complete the details as in the example below and click Save.

Clicking on the E-Mail link will generate an email addressed to the email name specified in the preferred client software. It will load your default mail package (normally MS Outlook)

2.9 Adding a New Individual

Most clients for a Local Authority however are likely to be individual members of the public, and the Organisation will not be necessary. For these cases therefore, there is a quick entry screen for the *contact* details to be entered, and the system will create a dummy Organisation name, which will be useful nonetheless for fast searching.

To add an individual, ensure that there is no detail selected in the *Results* panel, and click **Add** on the top horizontal menu. Select **New Individual** from the dropdown list. The *New Individual* screen appears. Complete the fields as in the following example:

Click Save New Individual.

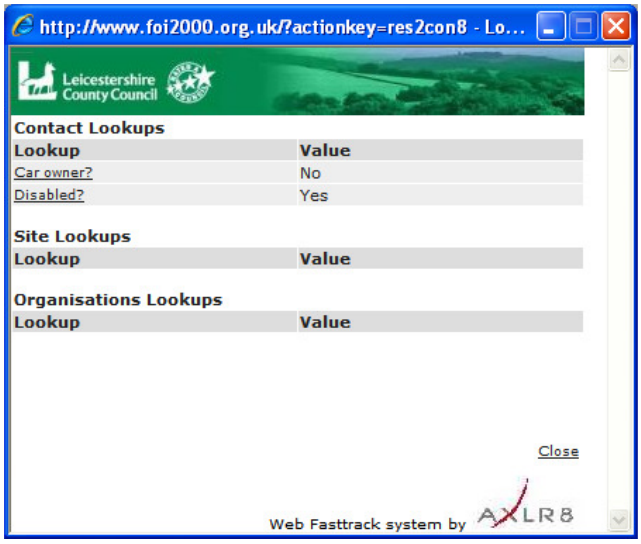
2.10 Setting Lookups

The Details screens for Organisations, Sites and Contacts contain fields for most of the information that is likely to be required for a comprehensive client history. However, inevitably, there will be data to be retained for a particular organisation which is not in the standard WebFastTrack package. *Lookups* are user-defined fields, designed for to allow you to add your own searchable criteria.

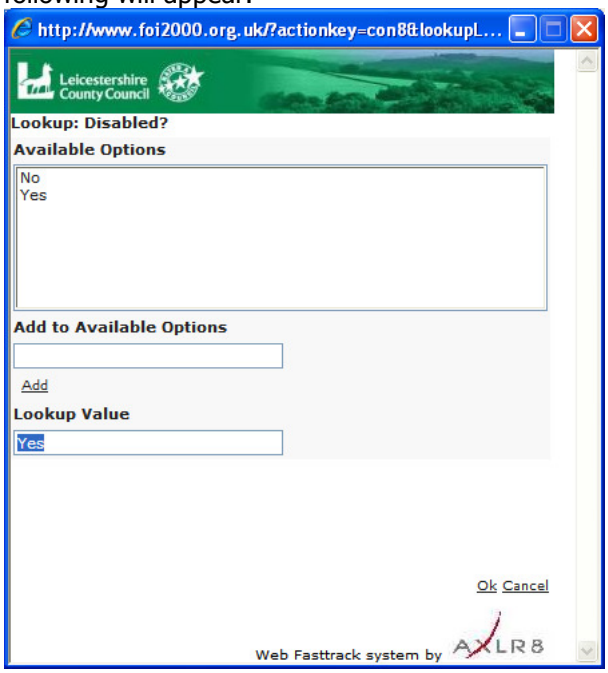
Lookups are set at Organisation, Site and Contact or any other object. It may be that a Local Authority might need to flag whether contacts in the database were disabled and have defined this as a Contact level lookup.

To assign a lookup value to a Contact, select the required Contact from the *Results* panel and, once underlined, click on **Details** from the top horizontal menu and select **Lookups** from the drop down list. (Shortcut: Click the "eye" icon in the top right corner of the screen). A list of all *lookups* for the selected Contact is displayed.

Award winning systems for fast moving businesses



To alter the lookup value, click on the lookup to be amended. A screen similar to the following will appear.

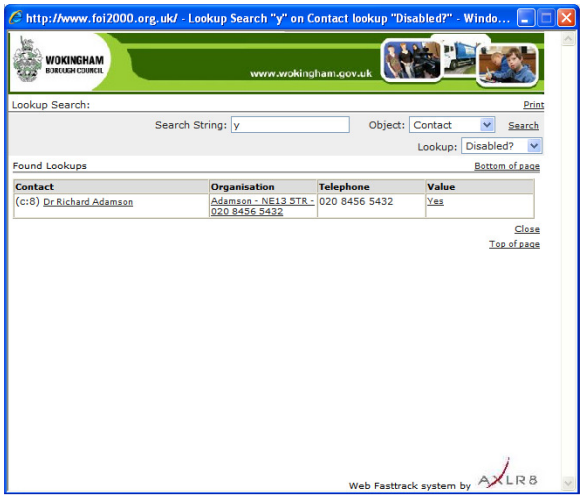


Enter the required lookup into the *Lookup Value* field and click Ok. If the value is to be made available to other users to select from, it should firstly be entered into the **Add to Available Options** field and **Add selected**. The value will then be entered into the *Available Options* panel, from where it can be selected for the contact in question.

2.11 Searching Lookups

It is also possible to search on Lookup values. Click **Search** from the top horizontal menu and select **Lookups** from the drop down list.

Firstly, select from the drop down list in the Object field whether it is an Organisation, Site or Contact lookup to be searched. Then click the Lookup drop down and select the Lookup to be searched. Finally enter the value to be searched for in the Search String field, using the "%" wildcard if necessary. In the following example, all occurrences of the Contact lookup "Disabled?" have been searched for any string beginning with "y", which brings back all contacts with the value "Yes" in the Disabled? lookup.



From this screen, click on any Contact or Organisation name to go directly to the Contact or Organisation details, or click on the lookup values to go directly to the Lookups screen to view or reset any values.

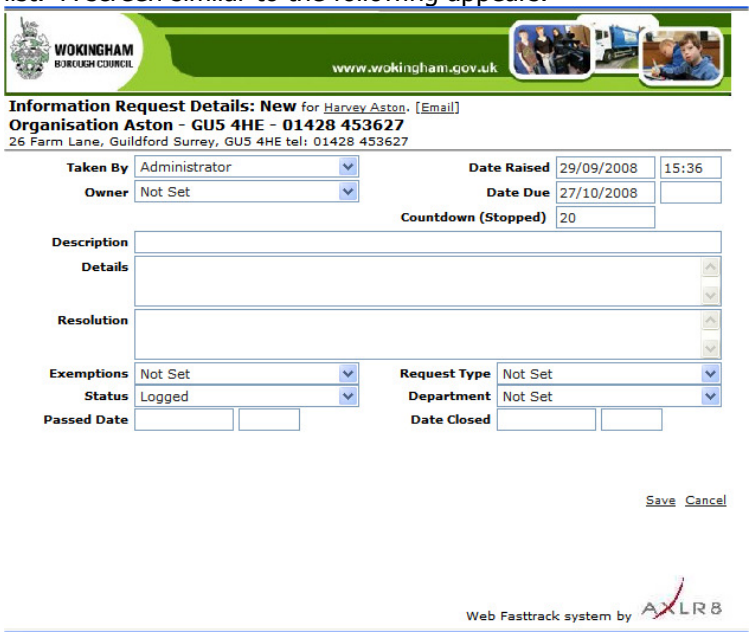
3 Information Requests

3.1 Overview of the Information Request Module

As *Information Requests* are submitted by members of the public, they are logged in the system and assigned to a staff member to deal with. A *countdown timer* then commences. Email alerts can be sent as reminders to the staff member that they only have a certain number of days remaining in which to send the response. When the information requested has been sent, the issue is closed and the timer stops.

3.2 Adding an Information Request

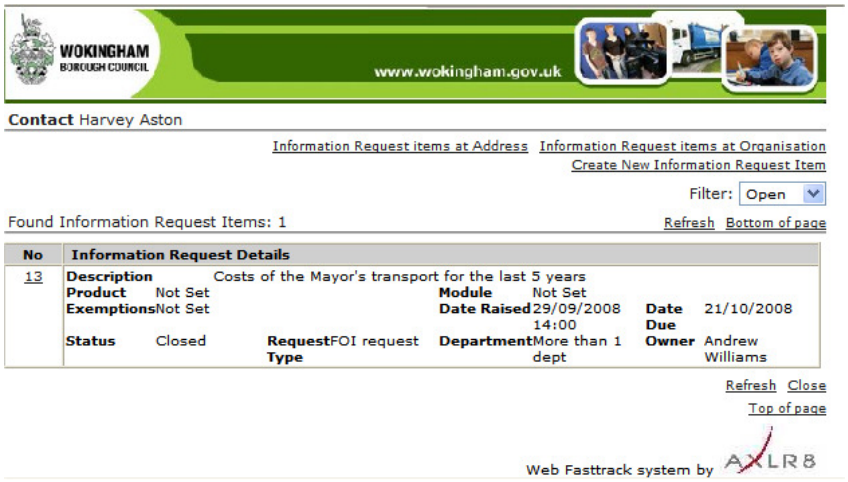
When an Information Request is submitted, it must be logged on the system. Firstly the contact that requested the information must be found (as described in Section 2.3.3), or if this is their first information request and they do not exist on the system they must be added (as described in Section 2.8). Click on the contact name on the *Results* panel so that the name is selected and underlined. Then click **Add** on the top horizontal menu and select **New Information Request Item** from the drop down list. A screen similar to the following appears.



Select the person responsible for supplying the information from the *Owner* drop down list. Give a brief outline of the Request in the *Description* field, and further details can be added in the *Details* field below. If Exemptions apply, the reason can be selected from this drop down list. The *Status* remains "Logged", and the current date can be entered as the *Passed Date* i.e. the date on which the Information Request was "passed" to the appropriate staff member responsible. The *Request Type* is then selected; this is important as if it should be a DPA request, the countdown then changes to be 40 days. In future, different stautes may define different response times. The responsible *Department* must also be selected. Click **Save** and the Information Request is automatically assigned a unique number.

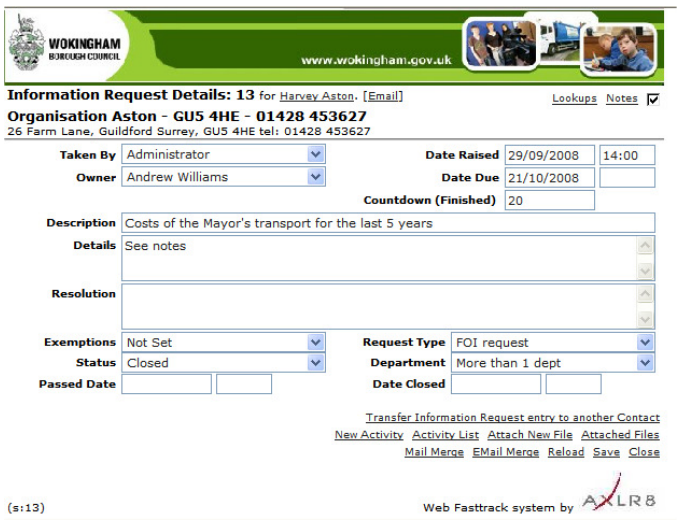
3.3 Viewing Information Requests

To view the *Information Requests* submitted by a specific member of the public, the contact in question must be found (as described in Section 2.3.3). Click their name in the *Results* panel to underline it, and then click **Details** from the top horizontal menu bar and select **Information Request Items** from the drop down list. A screen similar to the following will be displayed.



Only *Open* Information Requests are displayed, but if a list of *all* Information Requests ever submitted by the contact is required, click the Filter drop down and select **All**. Then click **Refresh**.

To see the full details of any Requests in the list, click the reference number in the left hand column and a screen similar to the following is displayed.



Award winning systems for fast moving businesses

Award winning systems for fast moving businesses

Any details on the above screen can be amended, except for the *Countdown timer*, which can not be tampered with. Remember to click **Save** after updating any details.

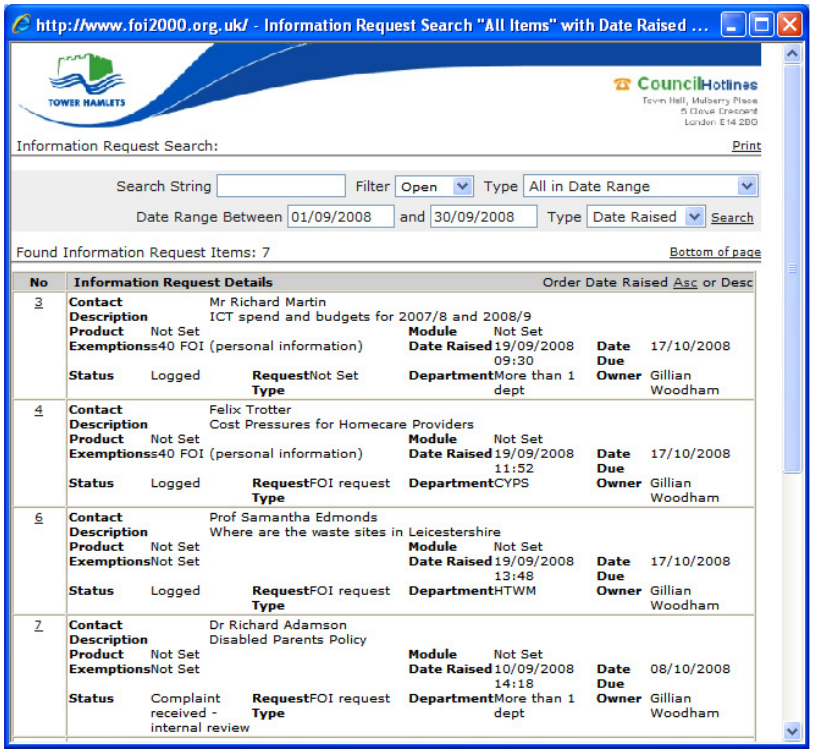
Notes and Lookups connected with the *Information Request* can be accessed via the links in the top right of the screen. In the example above, the tick in the checkbox by the link to *Notes* indicates that notes exist for the *Information Request*, otherwise it would be left blank (i.e. no tick). To see the Notes, click the link and a screen similar to below appears.

http://www.foi2000.org.uk/?actionkey=sup13 - Notes for Information Requ...
Leicestershire County Council
New Note
By:sarahg On:11/04/2007 17:05
letter to C Exec. Ack by C Andrews 15/2/05
This is an active Note. Click here to Flag this Note as Obsolete.
This note is Private. Click here to Flag this Note as Public.
Show Obsolete Notes Refresh Print Close
Web Fasttrack system by AXLR8

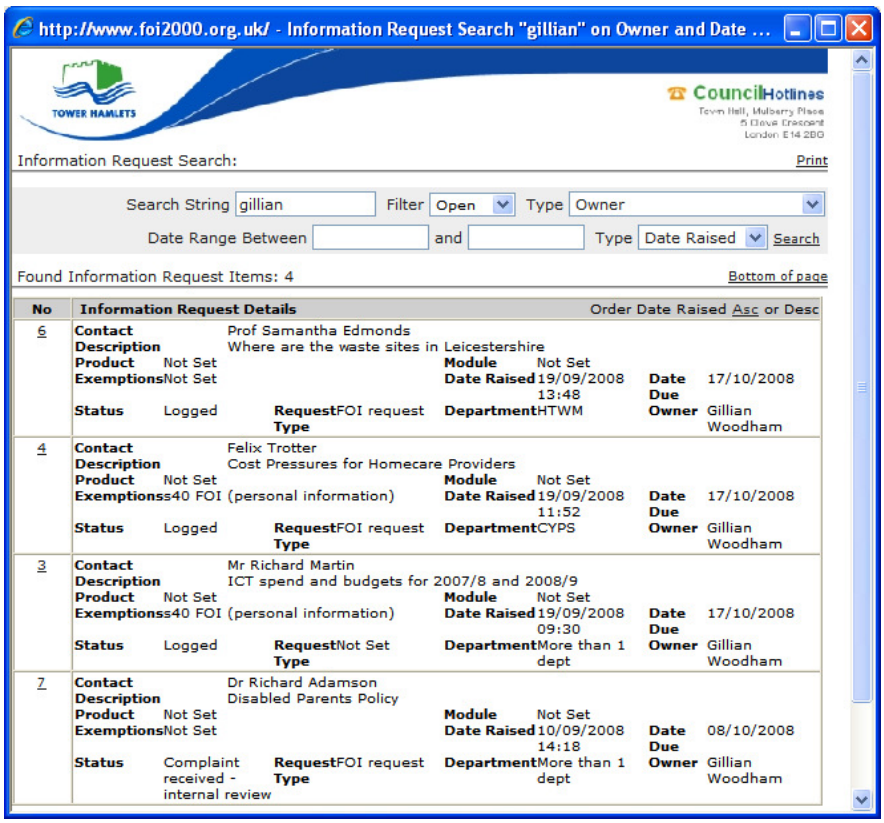
From the *Information Request Details* screen, it is also possible to view and add *Files* and *Activities*, and to *mailmerge* and *Emailmerge* responses to the contact. All these functions are dealt with in greater detail in other sections of this manual.

3.4 Searching for Information Requests

Information Requests can be searched using a variety of criteria. Click **Search** on the top horizontal menu and select **Information Request Items** from the drop down list. If you wish to find all *Information Requests* submitted within a certain month, leave the default *All in Date Range* in the *Type* field. If it is only the *Information Requests* that are still *Open* that are required, leave the default *Open* in the *Filter* field, else select either *All* or *Closed* from the *Filter* drop down list. Leave *Date Raised* in the second Type field and enter 01/08/2008 and 31/08/2008 in the two Date range fields for all *Information Requests* submitted in August 2008. Click **Search** and a *Results* panel is displayed, as in the following example.

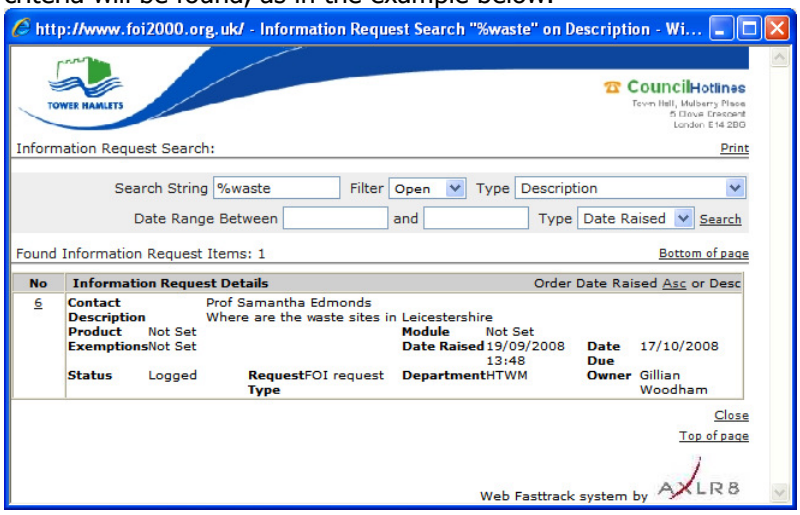

http://www.foi2000.org.uk/ - Information Request Search "All Items" with Date Raised ...
TOWER HAMLETS
CouncilHotlines
Information Request Search:
Print
Search String
Filter Open
Type All in Date Range
Date Range Between 01/09/2008 and 30/09/2008 Type Date Raised Search
Found Information Request Items: 7
Bottom of page
No
Information Request Details
Order Date Raised Asc or Desc
3 Contact Mr Richard Martin
Description ICT spend and budgets for 2007/8 and 2008/9
Product Not Set Module Not Set
Exemptions s40 FOI (personal information) Date Raised 19/09/2008 09:30 Date Due 17/10/2008
Status Logged Request Type Not Set Department More than 1 dept Owner Gillian Woodham
4 Contact Felix Trotter
Description Cost Pressures for Homecare Providers
Product Not Set Module Not Set
Exemptions s40 FOI (personal information) Date Raised 19/09/2008 11:52 Date Due 17/10/2008
Status Logged Request Type FOI request Department CYPS Owner Gillian Woodham
6 Contact Prof Samantha Edmonds
Description Where are the waste sites in Leicestershire
Product Not Set Module Not Set
Exemptions Not Set Date Raised 19/09/2008 13:48 Date Due 17/10/2008
Status Logged Request Type FOI request Department HTWM Owner Gillian Woodham
7 Contact Dr Richard Adamson
Description Disabled Parents Policy
Product Not Set Module Not Set
Exemptions Not Set Date Raised 10/09/2008 14:18 Date Due 08/10/2008
Status Complaint received - internal review Request Type FOI request Department More than 1 dept Owner Gillian Woodham

Alternatively, all *Information Requests* for which a certain employee is responsible can be found. Select **Owner** from the *Type* drop down list. If it is only the *Information Requests* that are still *Open* that are required, leave the default *Open* in the *Filter* field, else select either **All** or **Closed** from the *Filter* drop down list. Enter the name of the Employee in question in the *Search String* field and click **Search**. The results are displayed as follows:


http://www.foi2000.org.uk/ - Information Request Search "gillian" on Owner and Date ...
TOWER HAMLETS
CouncilHotlines
Information Request Search:
Print
Search String gillian
Filter Open
Type Owner
Date Range Between and
Type Date Raised Search
Found Information Request Items: 4
Bottom of page
No
Information Request Details
Order Date Raised Asc or Desc
6 Contact Prof Samantha Edmonds
Description Where are the waste sites in Leicestershire
Product Not Set Module Not Set
Exemptions Not Set Date Raised 19/09/2008 13:48 Date Due 17/10/2008
Status Logged Request Type FOI request Department HTWM Owner Gillian Woodham
4 Contact Felix Trotter
Description Cost Pressures for Homecare Providers
Product Not Set Module Not Set
Exemptions s40 FOI (personal information) Date Raised 19/09/2008 11:52 Date Due 17/10/2008
Status Logged Request Type FOI request Department CYPS Owner Gillian Woodham
3 Contact Mr Richard Martin
Description ICT spend and budgets for 2007/8 and 2008/9
Product Not Set Module Not Set
Exemptions s40 FOI (personal information) Date Raised 19/09/2008 09:30 Date Due 17/10/2008
Status Logged Request Type Not Set Department More than 1 dept Owner Gillian Woodham
7 Contact Dr Richard Adamson
Description Disabled Parents Policy
Product Not Set Module Not Set
Exemptions Not Set Date Raised 10/09/2008 14:18 Date Due 08/10/2008
Status Complaint received - internal review Request Type FOI request Department More than 1 dept Owner Gillian Woodham

The *Information Request* search is also useful for finding any requests the same or similar to previous requests. For example, if you need to find if any requests have

been submitted previously concerning "waste", as long as this keyword has been used in the *Description* of the *Information Request*, it is possible to find it. Select **Description** from the *Type* drop down list. Select "**All**" from the *Filter* so that both *Open* and *Closed Information Requests* are included, and enter "%waste" in the *Search String* field, using the "%" as the wildcard. Any *Information Requests* satisfying the criteria will be found, as in the example below.



4 Activities

4.1 Overview

Sometimes it is necessary to break down *Information Requests* into various *Activities* concerned with collecting the information together prior to assembling the final response to the requestor. This is primarily for the purpose of allocating costs. For example, if an *Information Request* was submitted requesting details of use of a local lake, activities might be assigned to the Leisure department to gather information and also to the Environmental department. The cost of information gathering could then be recorded by each department and reported on when necessary.

4.2 Adding an Activity

Firstly the *Information Request* to which the Activity is connected must be opened.

From the Details screen, click New Activity. A screen similar to the following is displayed.

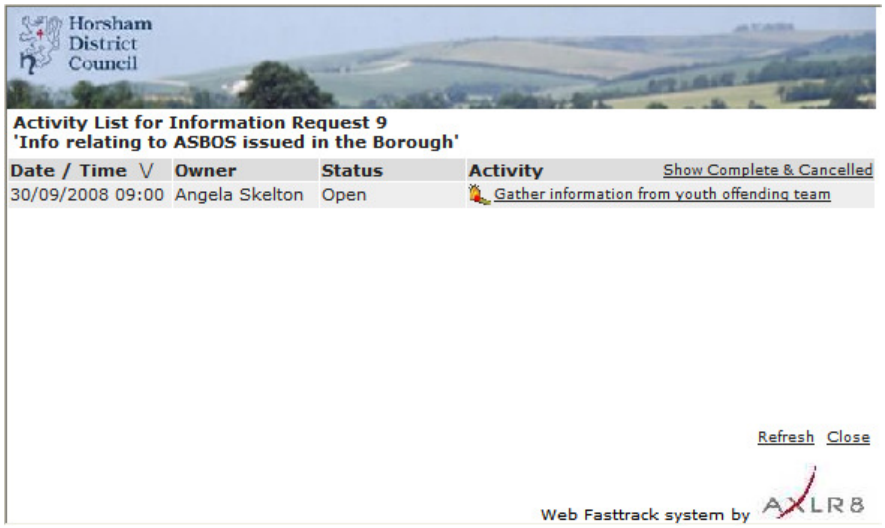
Horsham District Council
New Activity Details for 'Mr Rick Morgan'
Activity Name Gather information from youth offending team
Activity Type Information Gathering
Information Request 9: Info relating to ASBOS issued in the ...
Details
Owner Angela Skelton
Status Open
Date / Time 30/09/2008
Duration - Estimated 1 Hrs 30 Mins
Actual 0 Hrs 0 Mins
Attendees 0
Venue
Venue Booked
Venue Paid
Citizen Charged £ 0
Resources Cost £ 0
Ok Cancel
Web Fasttrack system by AXLR8

In the above example, the fields have been completed together with an estimated length of time for the activity. The actual length of time taken must be entered by the staff member when the *Activity* is completed. Costs can then be assigned.

Award winning systems for fast moving businesses

4.3 Viewing Activities

Activity progress can be viewed by the *Owner* of the *Information Request*. Firstly the *Information Request Details* screen must be accessed. Click the link for **Activity List**. A screen listing the connected *Activities* is displayed.

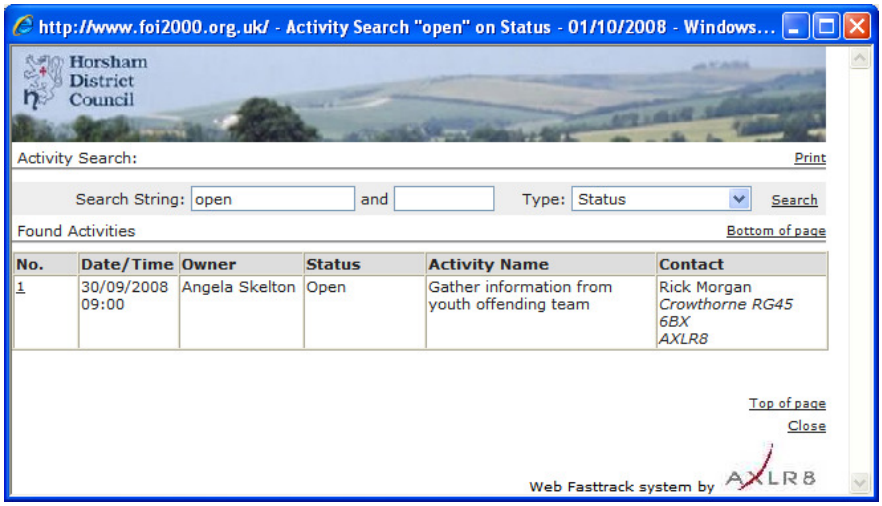


Click the link to the *Activity* for the *Activity Details* screen.

4.4 Searching for Activities

It might be necessary to search for all *Open Activities* to monitor progress. Click **Search** on the top horizontal menu bar and select **Activities** from the drop down list.

Activities can be searched using many different criteria. In this example, select **Status** from the *Type* drop down list and enter *Open* in the Search String field. Click **Search** and results similar to the following will be displayed. Click the unique Activity reference number in the left hand column to access the *Activity Details* screen.



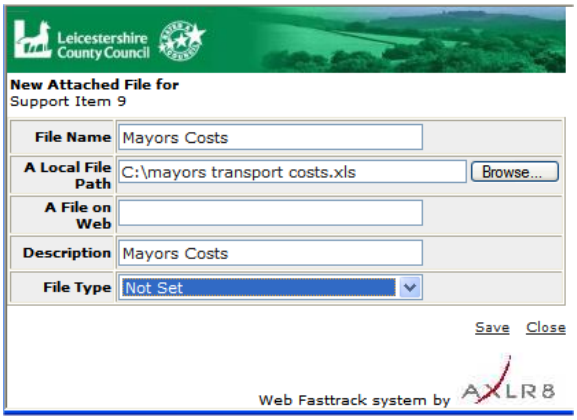
5 Attaching Files

5.1 Overview

To complete the Information Request, and to assist with fulfilling future requests, it may be necessary to attach files to the *Information Request*, such as a policy document or a spreadsheet of costs.

5.2 Adding a File

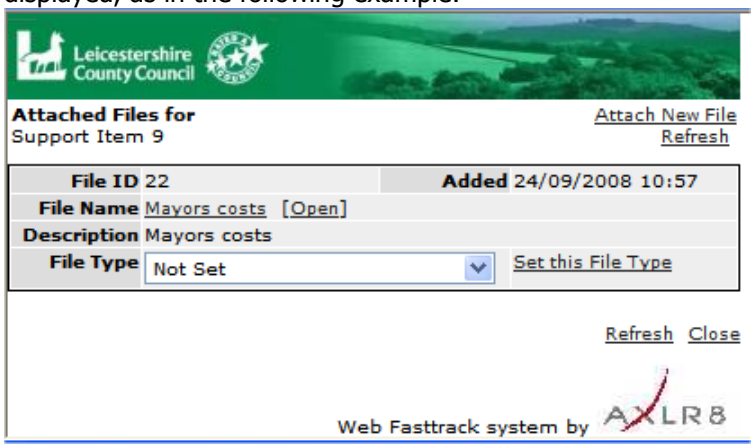
Firstly the details of the *Information Request* to which the file is to be added must be displayed.
Click the **Attach New File** link.
The *Attach New File* screen is displayed, as in the example below.



Add a name for the *File* and a *Desscripton*, and then either **Browse** for a file on the local disc or enter the file location on the web, complete with http://www …… etc. On clicking **Save**, an Uploading banner will appear temporarily at the bottom of this screen while the file is being uploaded to the web, where it is then accessible to all users.

5.3 Viewing Attached Files

Access the *Information Request* concerned, and from the *Details* screen click the **Attached Files** link. A list of all Files attached to the *Information Request* is then displayed, as in the following example.



The File can be viewed by clicking the Open link to the right of the filename.

6 Written communications

6.1 Overview of (e-)correspondence

The *Mailmerge* and *Emailmerge* functionality is useful for generating responses to people, particularly those which are regularly issued. Common responses can be formed into template documents and easily I.

6.2 Producing a Letter

Letter templates can be stored and sent individually to Contacts as and when necessary. To send a letter to a Contact, the template must have first been created.

AXLR8
tfm AWARDS 2007
BCS 2006 IM AWARDS
dti COMMERCE AWARDS 2005
Award winning systems for fast moving businesses

Award winning systems for fast moving businesses

From the *Contact Details* screen, click **Send Letter**. The *Template Chooser* screen appears.

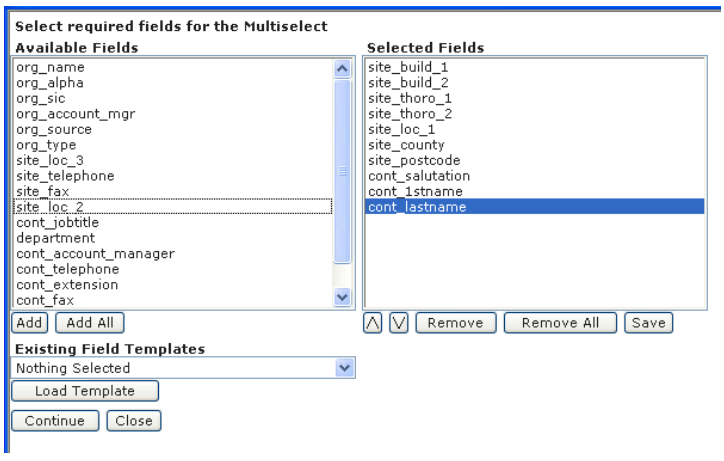
Click on the template name to select it. Select to Open the file on the following File Download warning and the letter will be displayed in Microsoft Word with your contact's data mailmerged. Any of the text of the letter can be amended prior to printing.

6.3 Producing a Mailshot

A mailshot is a mailmerge to more than one person. The template for the letter must have been created before commencing the mailshot.

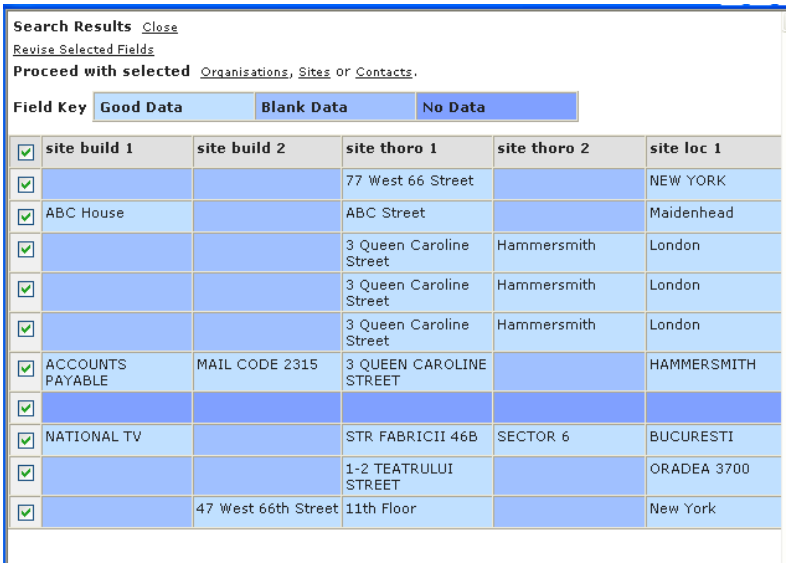
Firstly, search for the contacts to receive the mailshot so that they are all displayed on the Results panel. Click **MultiSelect**, which appears to the top left of the panel. The *Field Selection* screen is then displayed.

For a letter, usually most of the Address fields are required i.e. site_build_1, site_build_2, site_thoro_1, site_thoro_2, site_loc_1, site_county, site_postcode, plus the main contact fields i.e. cont_salutation, cont_1stname, and cont_lastname. Double click these to move them across to the right hand panel of *Selected Fields*, plus any other variables required.



Click **Continue**. The variable data is presented for the mailmerge with a link to **Revise Selected Fields**, if necessary.

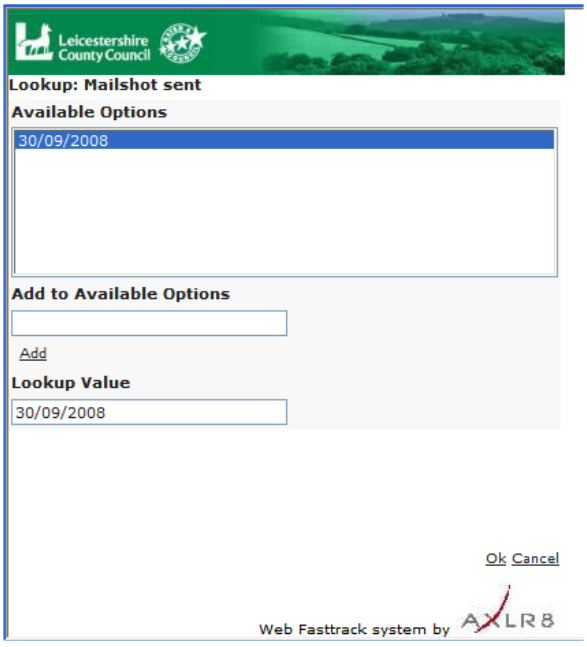
Award winning systems for fast moving businesses


Search Results Close
Revise Selected Fields
Proceed with selected Organisations, Sites or Contacts.
Field Key Good Data Blank Data No Data
site build 1 | site build 2 | site thoro 1 | site thoro 2 | site loc 1
77 West 66 Street | NEW YORK
ABC House | ABC Street | Maidenhead
3 Queen Caroline Street | Hammersmith | London
3 Queen Caroline Street | Hammersmith | London
3 Queen Caroline Street | Hammersmith | London
ACCOUNTS PAYABLE | MAIL CODE 2315 | 3 QUEEN CAROLINE STREET | HAMMERSMITH
NATIONAL TV | STR FABRICII 46B | SECTOR 6 | BUCURESTI
1-2 TEATRULUI STREET | ORADEA 3700
47 West 66th Street | 11th Floor | New York

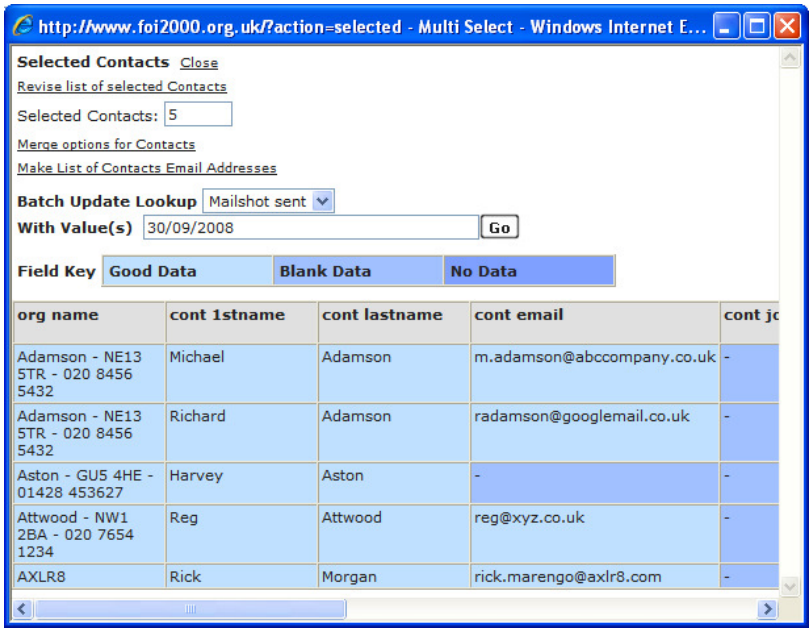
Click to proceed with selected **Contacts**.

On the next screen, the option is offered to update a Lookup for each contact to be mailmerged. It is an excellent idea to do so to facilitate finding the same contacts again at a later date. It is suggested that a *lookup* could be created entitled "Mailshots sent" for example. If all contacts were then updated with the name of the Mailshot and the current date, this data could then be searched on in 2 weeks when it was time to follow up for example. More information is found on Lookups in a later section.

Click the drop down list for Batch Update Lookup and select the Lookup to be updated. Double click within the With Value(s) field for a list of available options or to input a new value. In the example below, no values have been input previously, so a new value has been entered in the *Add to Available* Items field, and then been selected.



Click Ok to return to the previous screen.

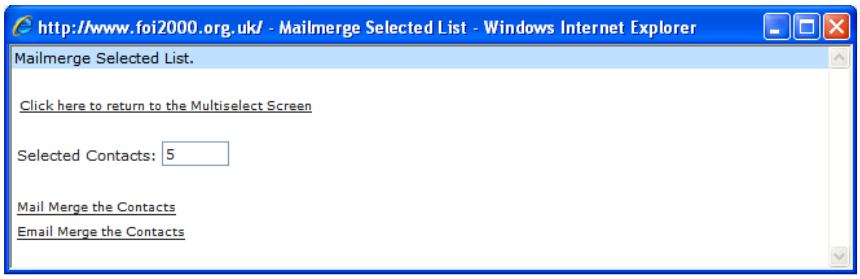

http://www.foi2000.org.uk/?action=selected - Multi Select - Windows Internet E...
Selected Contacts Close
Revise list of selected Contacts
Selected Contacts: 5
Merge options for Contacts
Make List of Contacts Email Addresses
Batch Update Lookup Mailshot sent
With Value(s) 30/09/2008 Go
Field Key Good Data Blank Data No Data
org name | cont 1stname | cont lastname | cont email | cont jc
Adamson - NE13 5TR - 020 8456 5432 | Michael | Adamson | m.adamson@abccompany.co.uk | -
Adamson - NE13 5TR - 020 8456 5432 | Richard | Adamson | radamson@googlemail.co.uk | -
Aston - GU5 4HE - 01428 453627 | Harvey | Aston | - | -
Attwood - NW1 2BA - 020 7654 1234 | Reg | Attwood | reg@xyz.co.uk | -
AXLR8 | Rick | Morgan | rick.marengo@axlr8.com | -

The *Lookup* value has been entered in the *With Value(s)* field. Click **Go** to update. You will be asked to confirm.

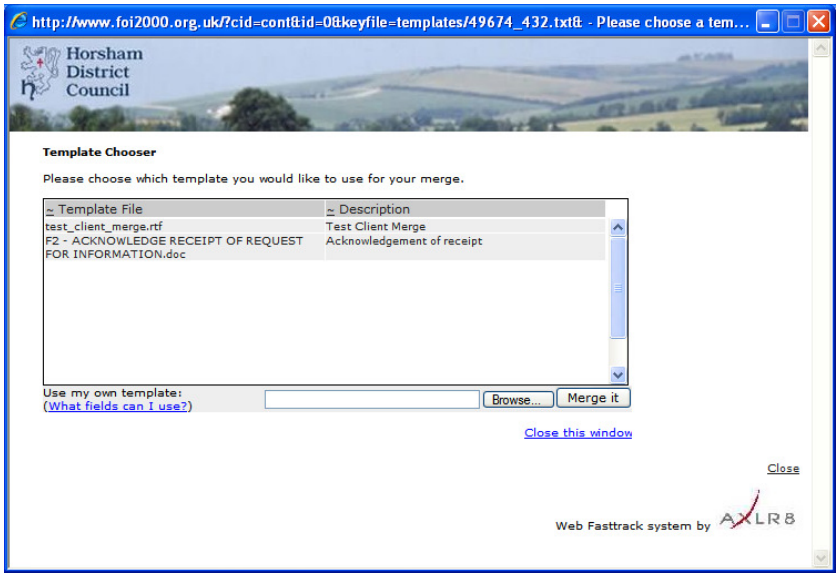
Windows Internet Explorer
Batch update Value of Lookup "Mailshot sent" to "30/09/2008" for every record in the Selected Contacts list ?
OK
Cancel

Click **OK** to confirm.

Select to **Merge Options for Contacts**. A confirmation screen appears, as below.


http://www.foi2000.org.uk/ - Mailmerge Selected List - Windows Internet Explorer
Mailmerge Selected List.
Click here to return to the Multiselect Screen
Selected Contacts: 5
Mail Merge the Contacts
Email Merge the Contacts

Click to **Mail Merge** the Contacts. The *Template Chooser* screen appears.

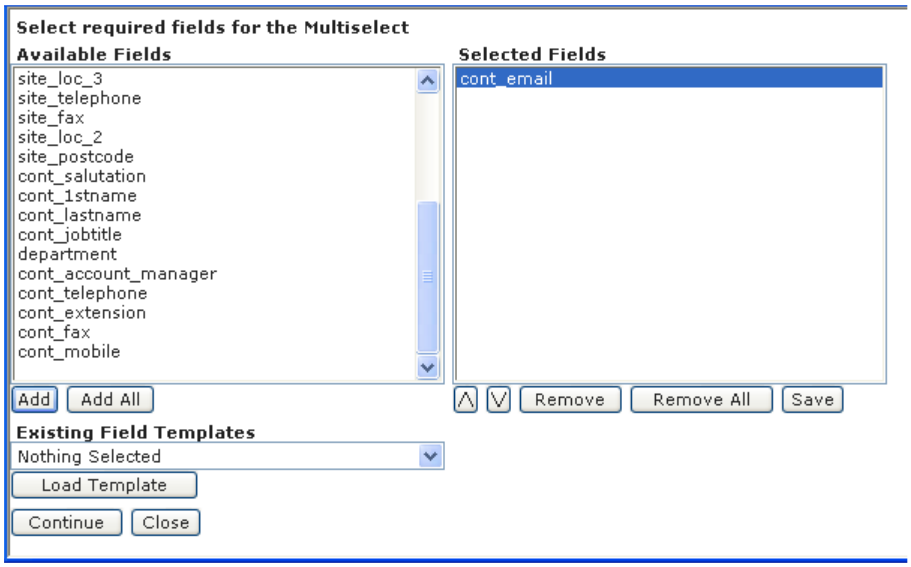


Click the required template name, and then select to open the file when prompted by the file download warning. A document then appears in Microsoft Word with one page for each Contact originally selected. Individual pages can be amended as required prior to printing.

6.4 Emailshots

Emailshots are easily achieved and are a 2-stage process. Firstly the mailing list must be built so that the contacts to be mailed appear in the results panel. So, if all contacts within the "SL" postcode area are to be mailed, this search must be performed.

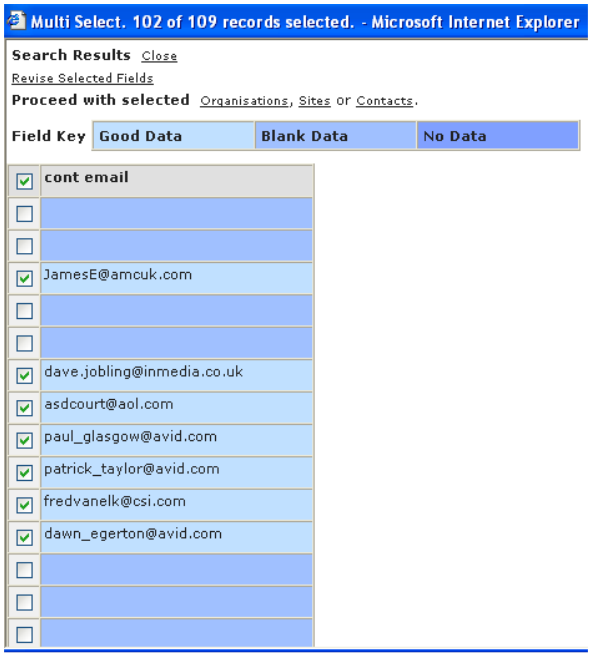
When all contacts are displayed on the *Results* panel, click **MultiSelect**, which appears to the top left of the panel. The *Field Selection* screen is then displayed. For an emailshot, generally very few fields are required and often only the email address. Select the required fields from the list of Av*ailable Fields* on the left so that they appear in the *Selected Fields* panel on the right. In the following example, only the Contact email field (cont_email) has been selected.



Click **Continue** to progress. The data for the emailmerge is then displayed. In this example, many contacts have been selected who do not have an email address

AXLR8
AWARDS 2007
BCS2006 IM AWARDS
dti COMMERCE AWARDS 2005
Award winning systems for fast moving businesses

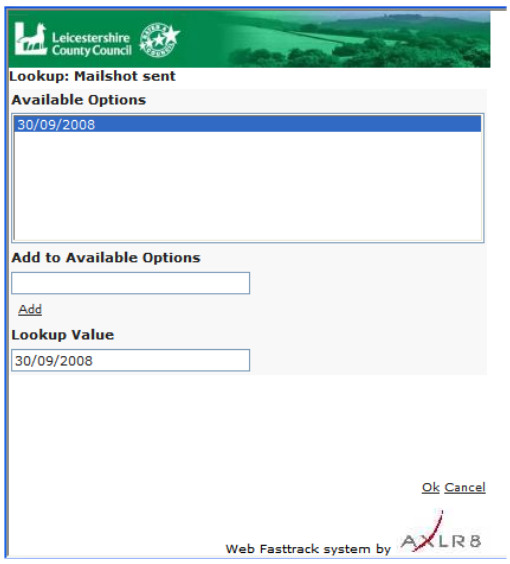
entered on the system. Emails will be generated for these contacts with blank 'To' fields, so these may as well be deselected, as in the following example.



Click to **Proceed** with selected Contacts.

On the next screen, the option is offered to update a *Lookup* for each contact to be mailmerged. It is an excellent idea to do so to facilitate finding the same contacts again at a later date. It is suggested that a lookup could be created entitled "Mailshots sent" for example. If all contacts were then updated with the name of the Mailshot and the current date, this data could then be searched on in 2 weeks when it was time to follow up for example. More information is found on Lookups elsewhere in this manual.

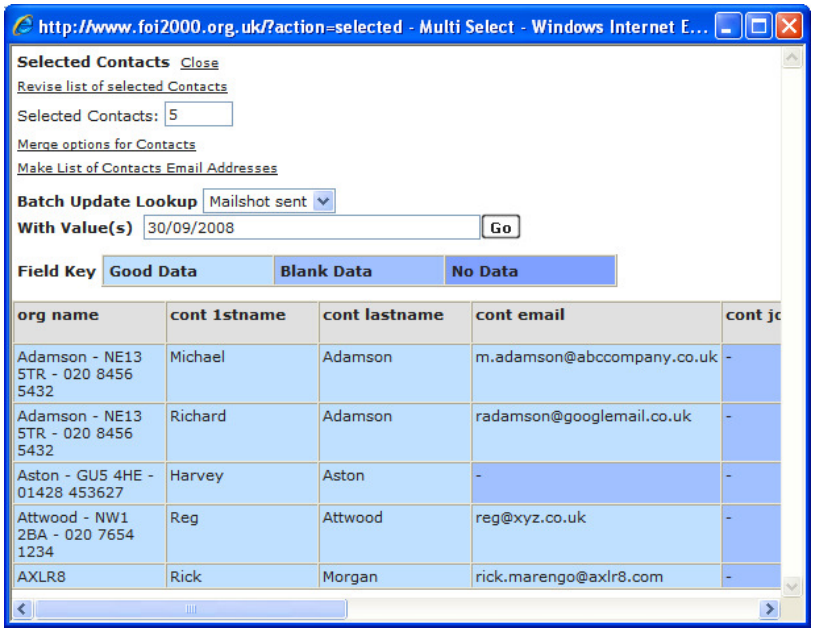
Click the drop down list for **Batch Update Lookup** and select the Lookup to be updated. Double click within the **With Value(s)** field for a list of available options or to input a new value. In the example below, no values have been input previously, so a new value has been entered in the *Add to Available Options* field.



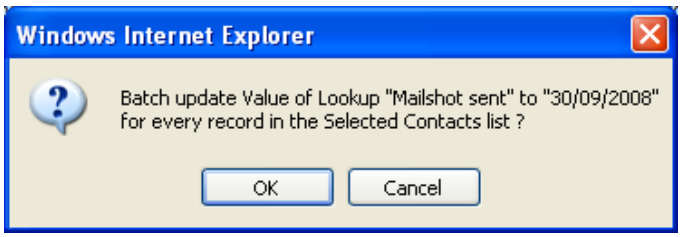
Click Ok to return to the previous screen.

Award winning systems for fast moving businesses

Award winning systems for fast moving businesses

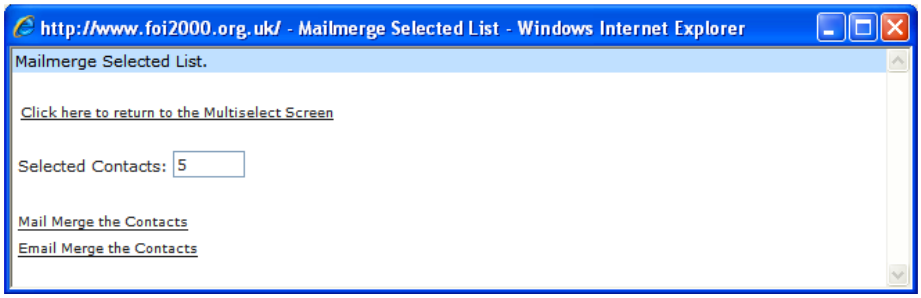

http://www.foi2000.org.uk/?action=selected - Multi Select - Windows Internet E...
Selected Contacts Close
Revise list of selected Contacts
Selected Contacts: 5
Merge options for Contacts
Make List of Contacts Email Addresses
Batch Update Lookup Mailshot sent
With Value(s) 30/09/2008 Go
Field Key Good Data Blank Data No Data
org name | cont 1stname | cont lastname | cont email | cont jc
Adamson - NE13 5TR - 020 8456 5432 | Michael | Adamson | m.adamson@abccompany.co.uk | -
Adamson - NE13 5TR - 020 8456 5432 | Richard | Adamson | radamson@googlemail.co.uk | -
Aston - GU5 4HE - 01428 453627 | Harvey | Aston | - | -
Attwood - NW1 2BA - 020 7654 1234 | Reg | Attwood | reg@xyz.co.uk | -
AXLR8 | Rick | Morgan | rick.marengo@axlr8.com | -

The Lookup value has been entered in the With Value(s) field. Click Go to update. You will be asked to confirm.


Windows Internet Explorer
Batch update Value of Lookup "Mailshot sent" to "30/09/2008" for every record in the Selected Contacts list ?
OK
Cancel

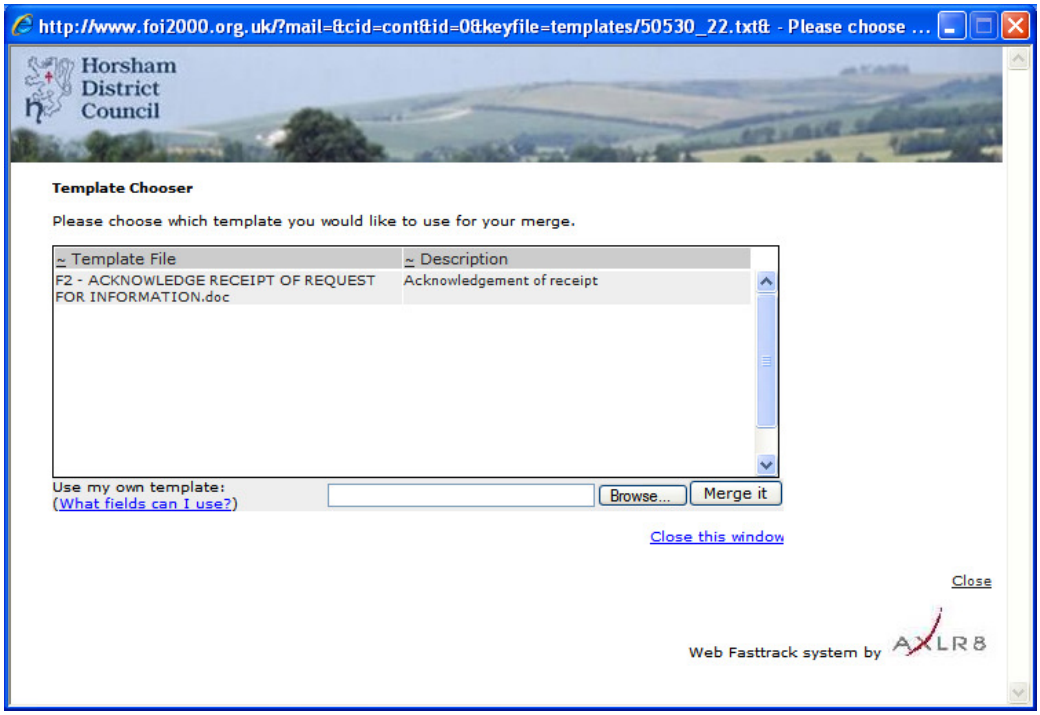
Click OK to confirm.

Select to Merge Options for Contacts. A confirmation screen appears, as below.


http://www.foi2000.org.uk/ - Mailmerge Selected List - Windows Internet Explorer
Mailmerge Selected List.
Click here to return to the Multiselect Screen
Selected Contacts: 5
Mail Merge the Contacts
Email Merge the Contacts

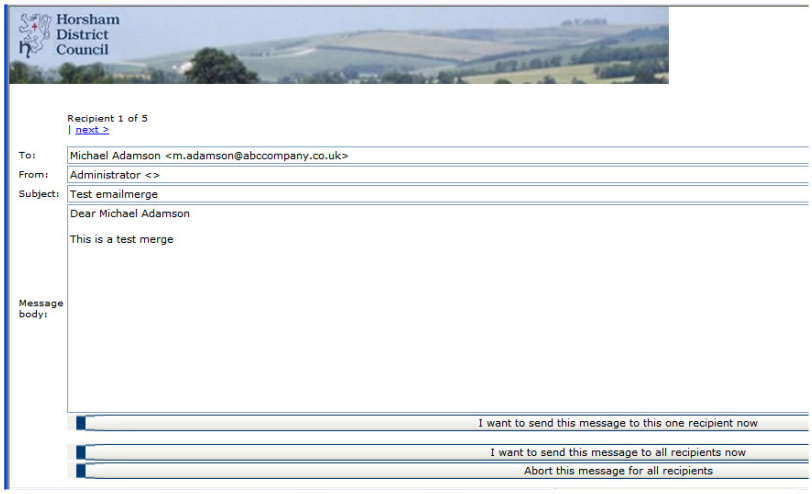
Click to Email Merge the Contacts. The Template Chooser screen appears.

On the *Template Chooser* screen, the template email must be selected. Click the required template.



It is also possible to edit templates and use files of your own, but this is discussed in greater detail later in this manual.

Click to **Merge** it. The emailshot file is displayed for final checking before sending.



The email can be edited prior to being sent if necessary. It is also possible to browse through each email and edit accordingly. Finally click to send to recipients.

7 Reports

7.1 Overview

Several reports are included in the AXLR8 FOI installation. Any bespoke reports required can be produced by AXLR8.

7.2 Reports Menu

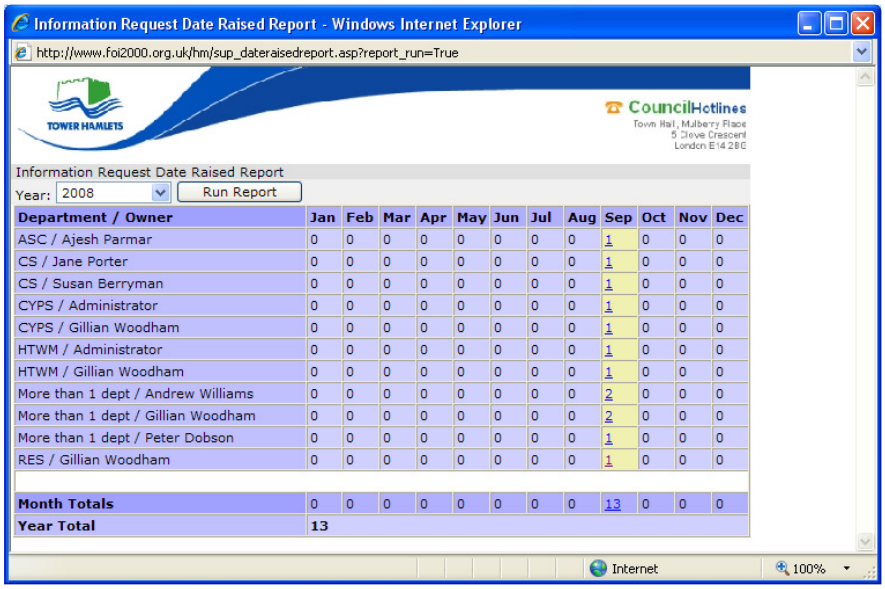
AXLR8
AWARDS 2007
BCS2006 IM AWARDS
dti COMMERCE AWARDS 2005
Award winning systems for fast moving businesses

Click on Admin on the top horizontal menu and select Reports from the drop down list. A screen similar to the following is displayed.

Leicestershire County Council
Information Request Date Raised Report
Information Request Cost Report
Information Request Number of Days to Resolve Report
Information Request Ongoing or Overdue Report
Close
Web Fasttrack system by AXLR8

7.2.1 Information Request Date Raised Report

The *Information Request Date Raised Report* supplies a breakdown by the year selected of the numbers of *Information Requests* raised per month, as in the example below.



Department / Owner	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ASC / Ajesh Parmar	0	0	0	0	0	0	0	0	1	0	0	0
CS / Jane Porter	0	0	0	0	0	0	0	0	1	0	0	0
CS / Susan Berryman	0	0	0	0	0	0	0	0	1	0	0	0
CYPS / Administrator	0	0	0	0	0	0	0	0	1	0	0	0
CYPS / Gillian Woodham	0	0	0	0	0	0	0	0	1	0	0	0
HTWM / Administrator	0	0	0	0	0	0	0	0	1	0	0	0
HTWM / Gillian Woodham	0	0	0	0	0	0	0	0	1	0	0	0
More than 1 dept / Andrew Williams	0	0	0	0	0	0	0	0	2	0	0	0
More than 1 dept / Gillian Woodham	0	0	0	0	0	0	0	0	2	0	0	0
More than 1 dept / Peter Dobson	0	0	0	0	0	0	0	0	1	0	0	0
RES / Gillian Woodham	0	0	0	0	0	0	0	0	1	0	0	0
Month Totals	0	0	0	0	0	0	0	0	13	0	0	0
Year Total	13											

In the above example, **Information Requests** have only been logged in September of the selected year. Click on any of the totals to run the *Information Request Cost Report*. This gives a breakdown of the costs (expenses and charges) for the selected month. The employee name, department and date range can all be reselected and the report re-run at this stage.

Award winning systems for fast moving businesses

Award winning systems for fast moving businesses

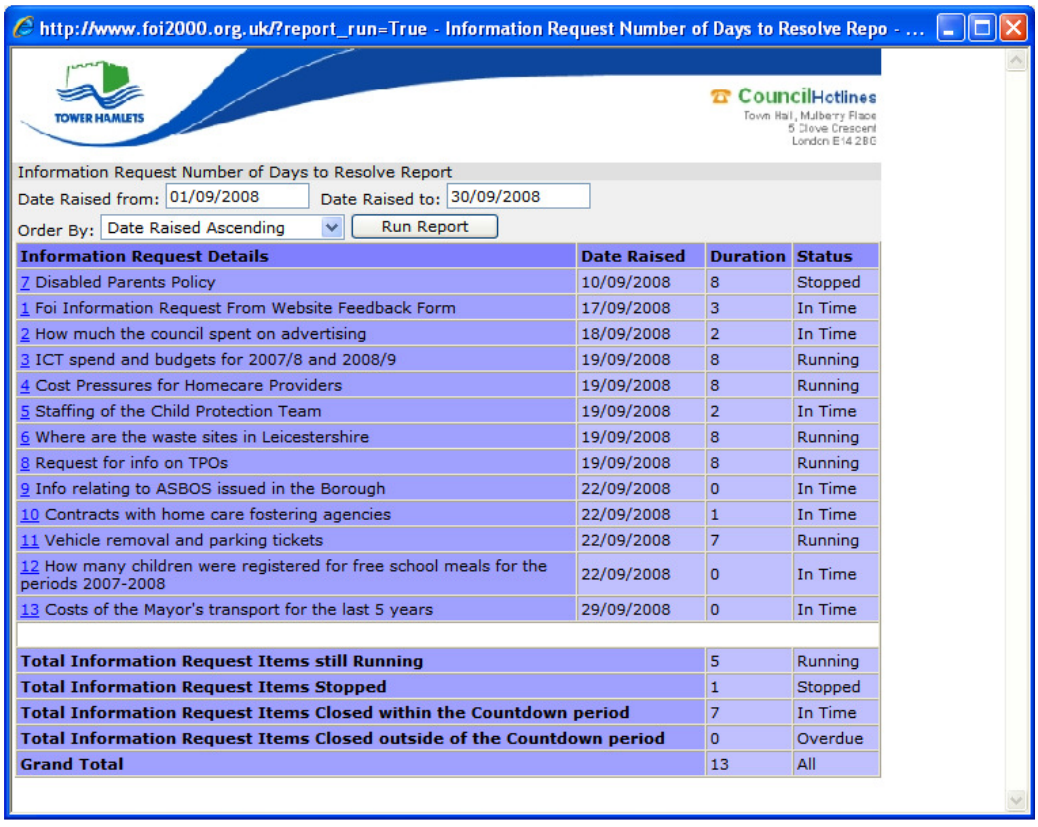
http://www.foi2000.org.uk/hm/sup_costreport.asp?fqs=Y&mv=9&yv=2008&ev=GILL+WOOD&uv=14
TOWER HAMLETS
CouncilHotlines
Town Hall, Mulberry Place
5 Clove Crescent
London E14 2BG
Information Request Cost Report
Owner: Gillian Woodham
Department: More than 1 dept
Date Raised from: 01/09/2008
Date Raised to: 30/09/2008
Run Report
7 Disabled Parents Policy
Activity | Citizen Charged | Resources Cost
Total | £0.00 | £0.00
3 ICT spend and budgets for 2007/8 and 2008/9
Activity | Citizen Charged | Resources Cost
Total | £0.00 | £0.00
Grand Total - 2 Information Request Items | £0.00 | £0.00

7.2.2 Information Request Cost Report

As described above, this report can be generated from the *Information Request Date Raised Report*. There is also a direct link to the **Information Request Cost Report** from the main **Reports Menu**.

7.2.3 Information Request Number of Days to Resolve Report

The *Information Request Number of Days to Resolve Report* gives a breakdown of the number of days over a defined time period that it has taken to respond to *Information Requests*, the current status of the *Information Requests*, with totals to summarise, as in the example below.

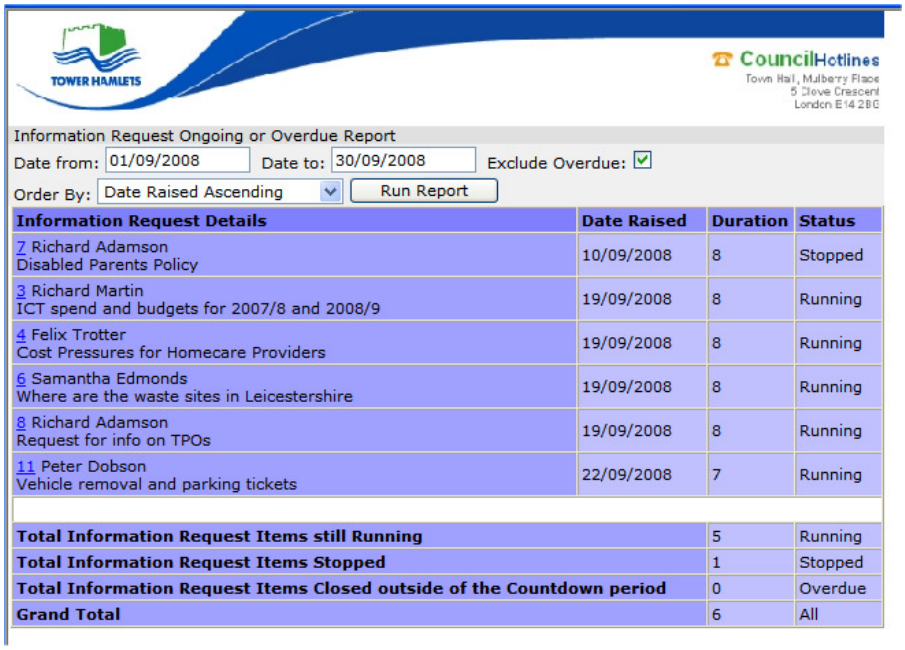

http://www.foi2000.org.uk/?report_run=True - Information Request Number of Days to Resolve Repo - ...
TOWER HAMLETS
CouncilHotlines
Town Hall, Mulberry Place
5 Clove Crescent
London E14 2BG
Information Request Number of Days to Resolve Report
Date Raised from: 01/09/2008
Date Raised to: 30/09/2008
Order By: Date Raised Ascending
Run Report
Information Request Details | Date Raised | Duration | Status
7 Disabled Parents Policy | 10/09/2008 | 8 | Stopped
1 Foi Information Request From Website Feedback Form | 17/09/2008 | 3 | In Time
2 How much the council spent on advertising | 18/09/2008 | 2 | In Time
3 ICT spend and budgets for 2007/8 and 2008/9 | 19/09/2008 | 8 | Running
4 Cost Pressures for Homecare Providers | 19/09/2008 | 8 | Running
5 Staffing of the Child Protection Team | 19/09/2008 | 2 | In Time
6 Where are the waste sites in Leicestershire | 19/09/2008 | 8 | Running
8 Request for info on TPOs | 19/09/2008 | 8 | Running
9 Info relating to ASBOS issued in the Borough | 22/09/2008 | 0 | In Time
10 Contracts with home care fostering agencies | 22/09/2008 | 1 | In Time
11 Vehicle removal and parking tickets | 22/09/2008 | 7 | Running
12 How many children were registered for free school meals for the periods 2007-2008 | 22/09/2008 | 0 | In Time
13 Costs of the Mayor's transport for the last 5 years | 29/09/2008 | 0 | In Time
Total Information Request Items still Running | 5 | Running
Total Information Request Items Stopped | 1 | Stopped
Total Information Request Items Closed within the Countdown period | 7 | In Time
Total Information Request Items Closed outside of the Countdown period | 0 | Overdue
Grand Total | 13 | All

Click on the *Information Request* reference number in the left hand column to access the *Information Request details* screen.

Award winning systems for fast moving businesses

7.2.4 Information Request Ongoing or Overdue Report

The *Information Request Ongoing or Overdue Report* gives a breakdown of the *Information Requests* that are current. By default, *Overdue Information Requests* are included in this report, whether they have been closed or not, so the option is given by the checkbox to exclude these from the Report, as in the following example.



TOWER HAMLETS

CouncilHotlines
Town Hall, Mulberry Place
5 Clove Crescent
London E14 2BG

Information Request Ongoing or Overdue Report

Date from: 01/09/2008 Date to: 30/09/2008 Exclude Overdue: ☑

Order By: Date Raised Ascending Run Report

Information Request Details	Date Raised	Duration	Status
7 Richard Adamson Disabled Parents Policy	10/09/2008	8	Stopped
3 Richard Martin ICT spend and budgets for 2007/8 and 2008/9	19/09/2008	8	Running
4 Felix Trotter Cost Pressures for Homecare Providers	19/09/2008	8	Running
6 Samantha Edmonds Where are the waste sites in Leicestershire	19/09/2008	8	Running
8 Richard Adamson Request for info on TPOs	19/09/2008	8	Running
11 Peter Dobson Vehicle removal and parking tickets	22/09/2008	7	Running
Total Information Request Items still Running		5	Running
Total Information Request Items Stopped		1	Stopped
Total Information Request Items Closed outside of the Countdown period		0	Overdue
Grand Total		6	All

Click on the Information Request reference number in the left hand column to access the Information Request details screen.

7.2.5 Public Disclosure Log

The **public disclosure log** presents the information that its name suggests. It shows the requests that have come in and how they were answered. More public authorities are publishing this information and the information commissioner encourages the practice.

Leicestershire County Council

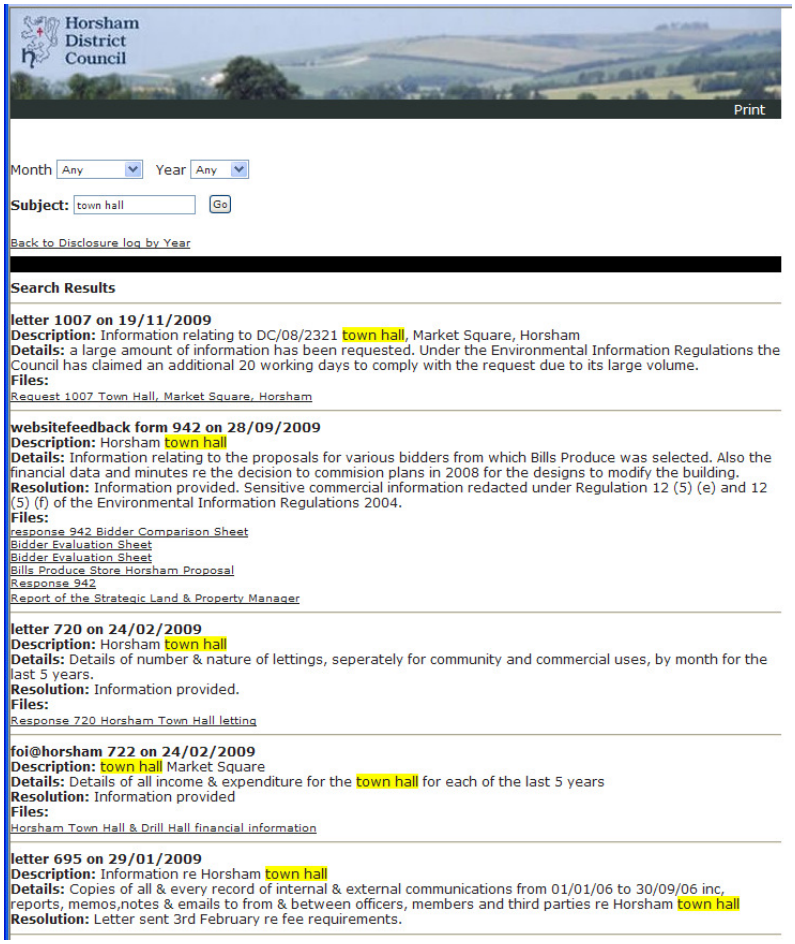
FOI requests for 2009 Key Word Search

Month	No of requests	Ongoing	responded to in under 10 days	responded to in 10 - 20 days	over target
January	45	0	22	23	0
February	42	0	25	17	0
March	40	0	21	18	1
April	52	0	21	29	2
May	33	0	12	17	4
June	41	2	16	20	3
July	67	0	32	34	1
August	49	1	21	26	1
September	40	1	17	21	1
October	57	3	31	23	0
November	40	3	15	18	4
December	36	9	13	13	1
Totals	542	19	246	259	18

Month	No of requests	contact @horsham	email request	foi@horsham	letter	Website feedback form	responded to in under 10 days	responded to in 10 - 20 days	Over target
January	20	6	4	6	4	0	13	7	0
February	27	3	6	10	5	0	18	7	2
March	16	2	5	4	3	0	10	6	0
April	19	3	3	6	5	0	12	7	0
May	16	2	4	6	3	1	11	5	0
June	20	2	6	5	6	1	10	10	0
July	25	2	8	8	5	0	13	12	0
August	27	2	5	9	10	0	12	12	3
September	35	2	6	6	5	0	31	4	0
October	11	1	1	4	2	1	11	0	0
November	0	0	0	0	0	0	0	0	0
December	0	0	0	0	0	0	0	0	0
Totals	216	25	48	64	48	3	141	70	5

Each of the month names in the left hand column is a link to that months information requests. You can see more on Horsham's site or on your own. However, please note that your organisation will have certain rules defining what fields are published and where you can store confidential information.

There is also a search facility so that the disclosed requests and their answers may be searched.


Horsham
District
Council
Print
Month Any Year Any
Subject: town hall Go
Back to Disclosure log by Year
Search Results
letter 1007 on 19/11/2009
Description: Information relating to DC/08/2321 town hall, Market Square, Horsham
Details: a large amount of information has been requested. Under the Environmental Information Regulations the Council has claimed an additional 20 working days to comply with the request due to its large volume.
Files:
Request 1007 Town Hall, Market Square, Horsham
websitefeedback form 942 on 28/09/2009
Description: Horsham town hall
Details: Information relating to the proposals for various bidders from which Bills Produce was selected. Also the financial data and minutes re the decision to commision plans in 2008 for the designs to modify the building.
Resolution: Information provided. Sensitive commercial information redacted under Regulation 12 (5) (e) and 12 (5) (f) of the Environmental Information Regulations 2004.
Files:
response 942 Bidder Comparison Sheet
Bidder Evaluation Sheet
Bidder Evaluation Sheet
Bills Produce Store Horsham Proposal
Response 942
Report of the Strategic Land & Property Manager
letter 720 on 24/02/2009
Description: Horsham town hall
Details: Details of number & nature of lettings, seperately for community and commercial uses, by month for the last 5 years.
Resolution: Information provided.
Files:
Response 720 Horsham Town Hall letting
foi@horsham 722 on 24/02/2009
Description: town hall Market Square
Details: Details of all income & expenditure for the town hall for each of the last 5 years
Resolution: Information provided
Files:
Horsham Town Hall & Drill Hall financial information
letter 695 on 29/01/2009
Description: Information re Horsham town hall
Details: Copies of all & every record of internal & external communications from 01/01/06 to 30/09/06 inc, reports, memos,notes & emails to from & between officers, members and third parties re Horsham town hall
Resolution: Letter sent 3rd February re fee requirements.

In this case, the user has searched on the Horsham District Council Public Disclosure Log for the words "TownHall".

Award winning systems for fast moving businesses

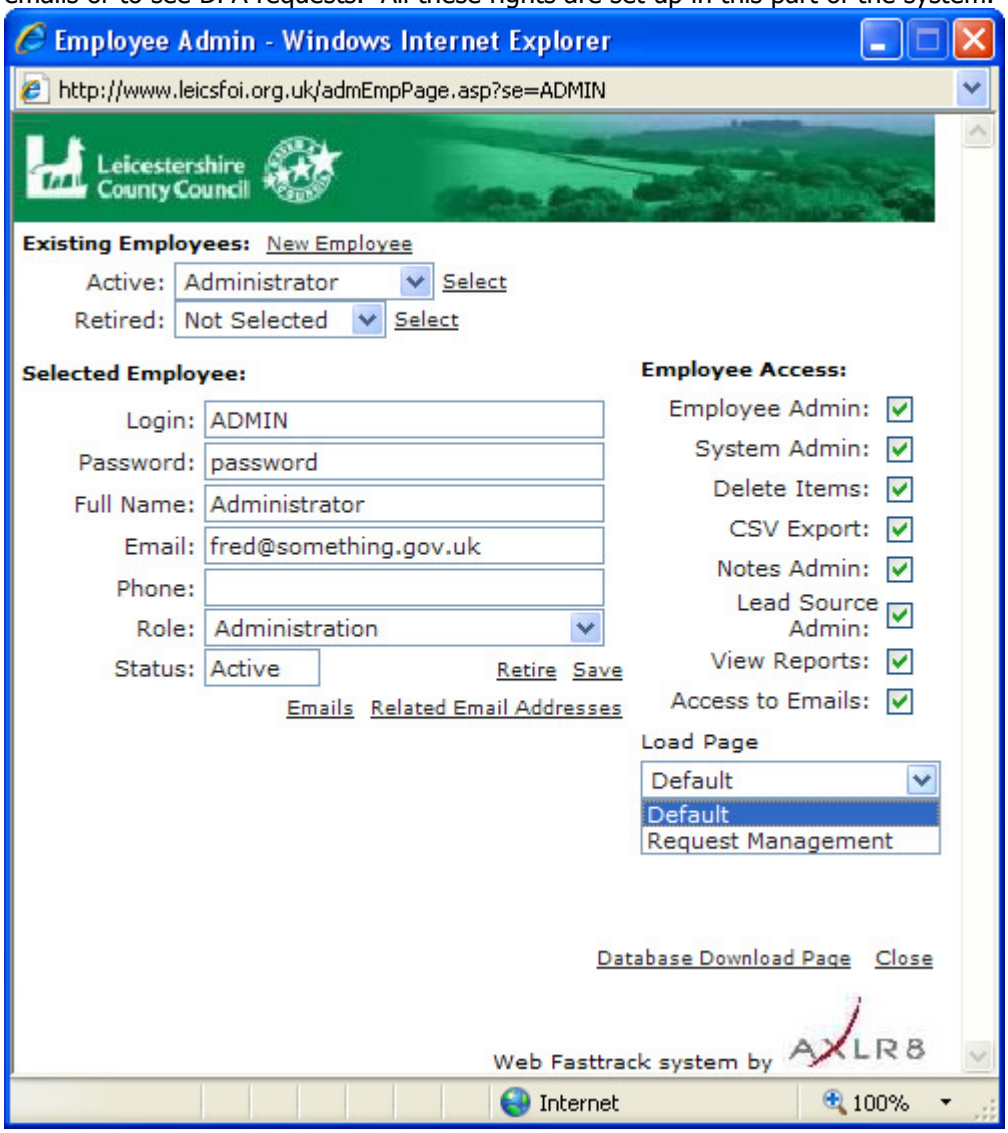
Award winning systems for fast moving businesses

8 Administration of the system.

The admin menu contains a number of tools for setting up the system. These are intuitive to systems administrators and normally introduced in detail to client SAs as part of the set up of the system or a part of the support service.

8.1 Employee admin

Each employee can have a number of different authorities granted to them. For example, only one or two employees of an authority should have "Employee Admin" capability. Some will not have the rights to delete data, others may not see attached emails or to see DPA requests. All these rights are set up in this part of the system.

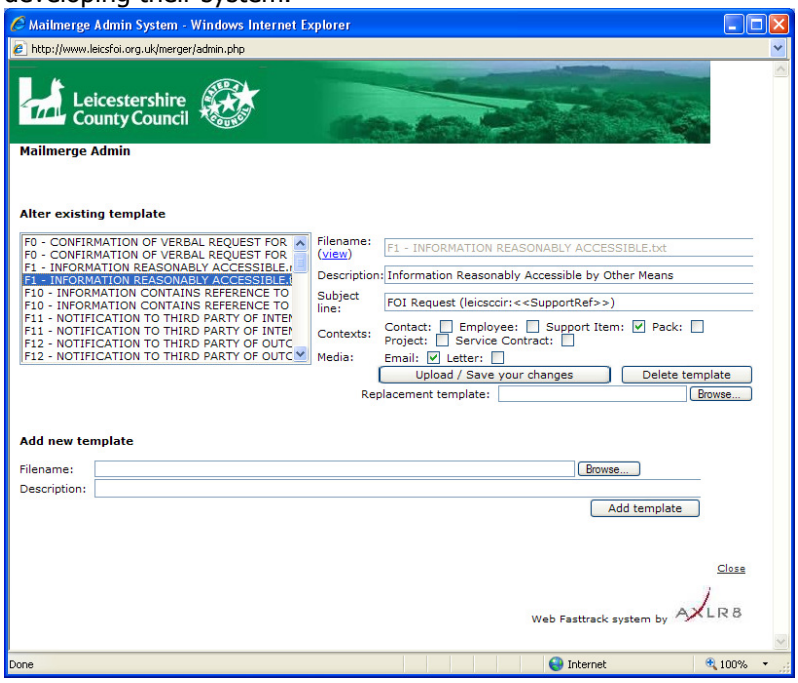


Importantly, whether a particular user logs into the default screens described up to this point or into the Information Request Manager screen described in the next section, will be defined in this screen.

Note that there are also some "employees" that are robots rather than people. These include *AXLR8Triggers* and *Web entry*. These are set up as sources of information or placeholders in the system and do their various automated tasks 24/7.

8.2 Document template admin

This is an essential part of the work flow.
In any context in the AXLR8 system, there will be different fields you can mail merge into documents. As the screen shot below shows, you need to consider the medium in which a template is to be sent (SMS, plain text or RTF email, HTML email, letter on paper of fax, etc) and the context (just a general letter to a person or a letter where specific information is merged in from a specific information request.
The full functionality of the mail merge system including how the subject line of an email is significant for where email correspondence is automatically attached, is discussed in other documentation and fully introduced to clients when setting up and developing their system.



8.3 Web entry admin

As mentioned earlier, these come in to a "box" which you choose. Typically an employee called "FOIRequests" or similar. Examining them periodically, you can attach the requests to "real" jobs and real contacts and employees to own and work on them. Web entries (online requests) are managed through a link that you can place anywhere on your public website. Because some of our clients received "spam" entries, there are a number of new features available including:

- A simple "Turing" type test to make sure a human is placing the requests and not some automated "spiderbot".
- A selected status you can pick so that the "silly" or false requests can be excluded from the reports and especially the public disclosure pages.
- A human decision to let new self service web visitors' requests and contact details through the "Gate" and into your datasbase.

8.4 Labels

Labels admin is really self explanatory AS LONG AS you know which label is which. The changing of labels is open to administrators but it should be an infrequent job. So, feel

Award winning systems for fast moving businesses

free to call AXLR8 on 01344 776500 or write to support@axlr8.co.uk if you have any issues. For most changes to the information request tracking sheets, the drop down list you should load is called "SUPLABELS".

8.5 Drop downs

This important area allows you to set, not just the drop down choices for the system but also how they behave. For example, in the drop down choices for departments, you can put the departments that your organisation has from time to time. They are just names that come up in reports

However, there are some drop down choices that change behaviour. The most significant one in the Information Request Management system is the one that associates the status of the request (see first diagram describing the workflow at the beginning of this document) with the

WebFastTrack Dropdowns Admin

Activity Status	Activity Type	Call Type	Call Result	Mortgage Proposal Status
Support Type	Support Status	Support Priority	Support Urgency	Lookup Admin
Support Products	Support Modules	Service Contract Type	Service Contract Status	Service Contract Time Period
Deal Status	Deal Progress	Deal Product Types	Deal Products	Org Type Admin
Locations Admin				

Logout

New Support Status

Description:
Disabled: (Y or N)
Order: (Numeric. 0 is first)
Trackable: (0, 1 or 2) 0=onhold, 1=running, 2=finished
Close: (0 or 1)
Customer Editable: (0 or 1) > if Close is 1 then this must be 0
Editable Target: (0 or 1)

New Support Status Save New Support Status

Support Status Value's

Key	Description	Order	Trackable	Close	Disabled	Customer Editable	Editable Target
2	Logged	0	1	0	N	0	0
3	Acknowledgement Sent	1	1	0	N	0	0
8	Clarification requested	3	0	0	N	0	0
19	With department	4	1	0	N	0	0
20	Closed	5	2	1	N	0	0
23	Complaint received - internal review	6	0	0	N	0	0
24	Complaint received - ICO	7	0	0	N	0	0
28	Complaint Resolved	10	2	1	N	0	0

The "close" variable defines whether a status closes an information request and causes it to stop the clock if the trackable variable is 2. It pauses the clock if the trackable variable is 0 however, the clock carries on running (for 20 working days for an FOI or EIR request and 40 calendar days for a DPA request for example) if the trackable variable is set to 1.

9 Section on the Information Request manager's portal.

9.1 Logging in

You will get eh same log in screen as the the ,main system but, if you are an information request manager, you will see a screen that is primarily a list of jobs and has none of the search and general contact management facilities that an administrator gets. Depending on your level of involvement, you will have different functions switched on:
DPA and other specific queries may be blocked
You may not be able to see reports or search on other requests in the knowledge base
You may not be able to add new requests or see your colleagues request queues

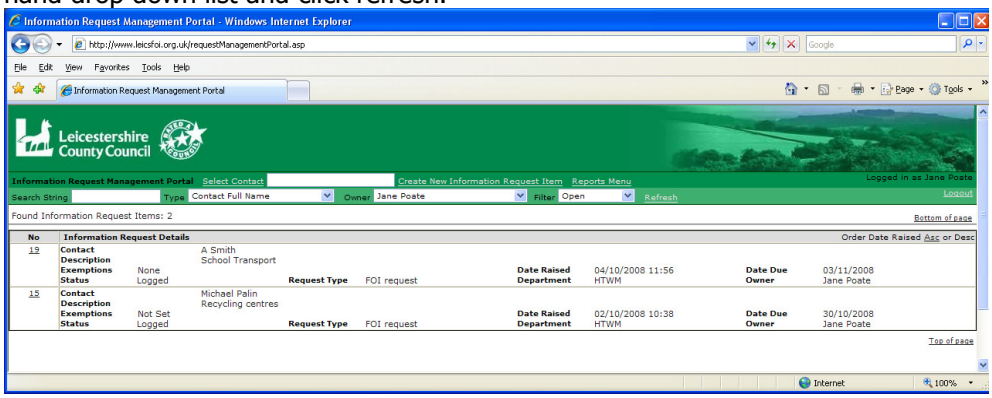
Award winning systems for fast moving businesses

Award winning systems for fast moving businesses

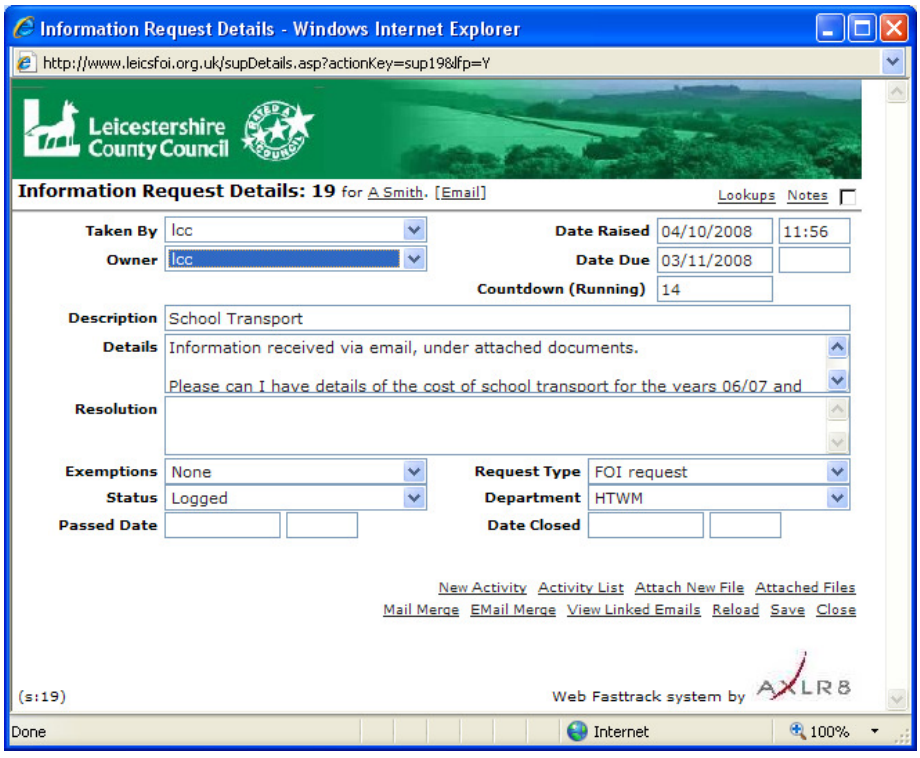
However, you will be able to see all the information necessary to answer the information requests for which you are responsible.

9.2 List of jobs/"Information requests" (open, closed, all)

In this list view, you can see all your open IRs and you can also see the filter on closed IRs. If you wish to see closed or all of your IRs then pick them from the top right hand drop down list and click refresh.

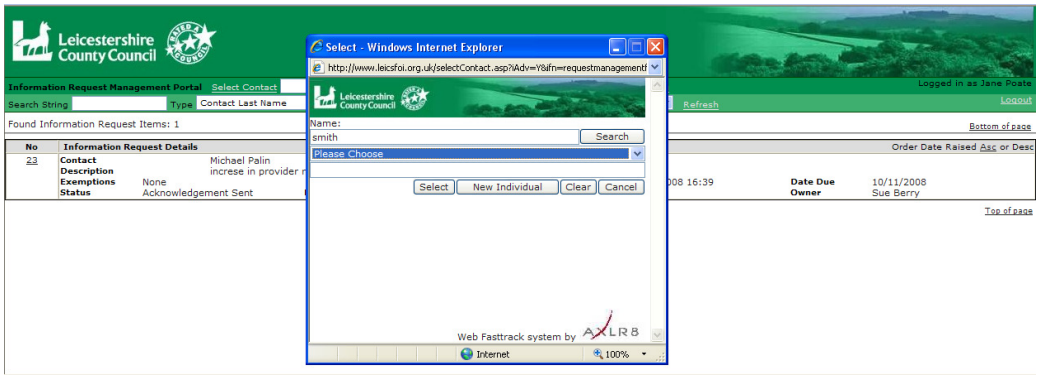

Information Request Management Portal - Windows Internet Explorer
Leicestershire County Council
Information Request Management Portal
Found Information Request Items: 2

Clicking on any IR number will bring up the details from which you can access all the notes, attached documents (public and private), emails attached (if you have bought the AXLR8MailTracker service) and sub task activities. The information request workflow is described elsewhere.

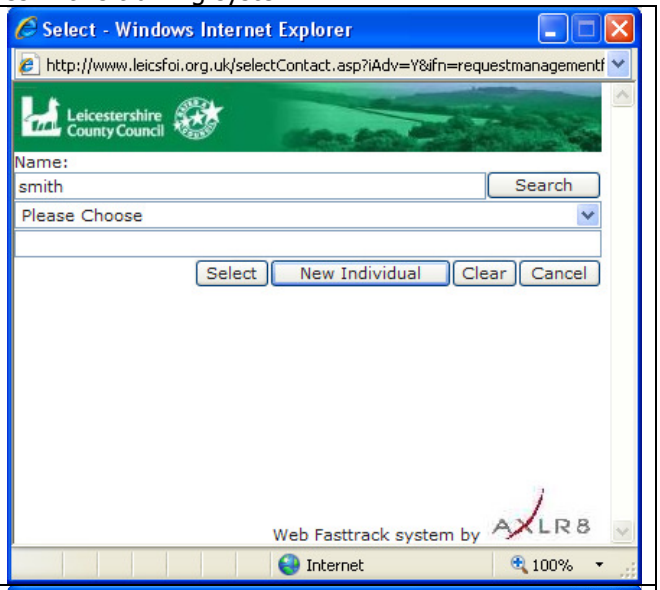
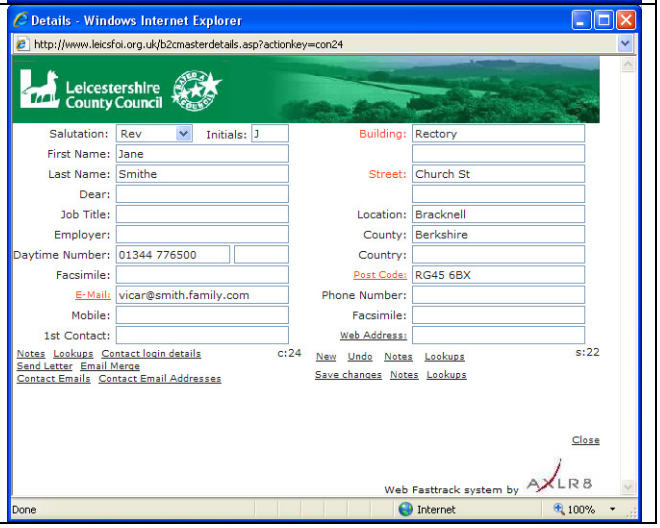


9.3 Creating new contacts and logging new information requests

You can create new contacts and then log Information Requests against them. In the case below, the select contact button has been clicked on the top row and the following search has been initiated on the surname "Smith"

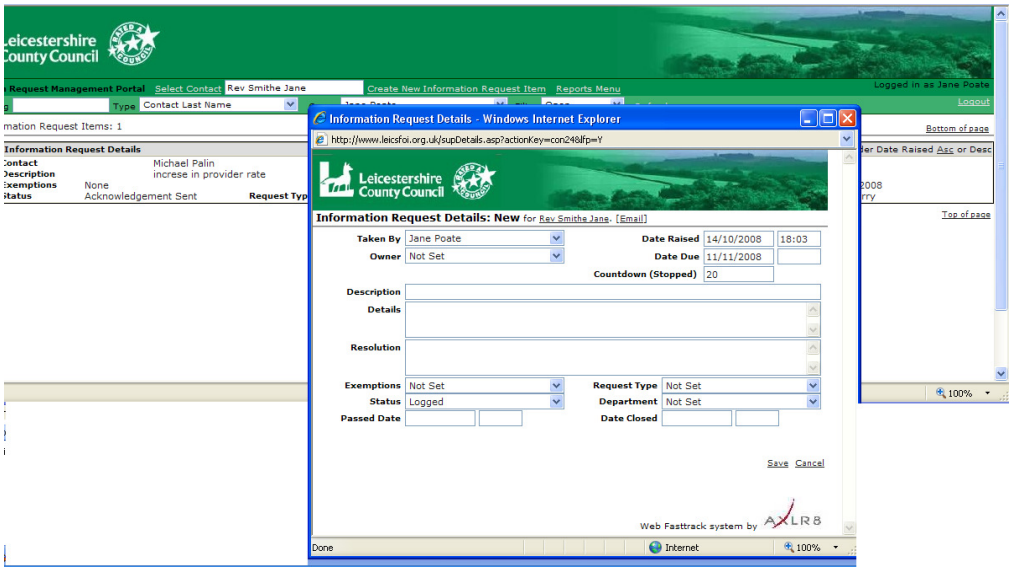


This brings up all the Smith families in this training system.

If the "Smith" you need is not there, you can hit the new individual button.	
This brings up the form for adding new people and you can add this new lady's details	

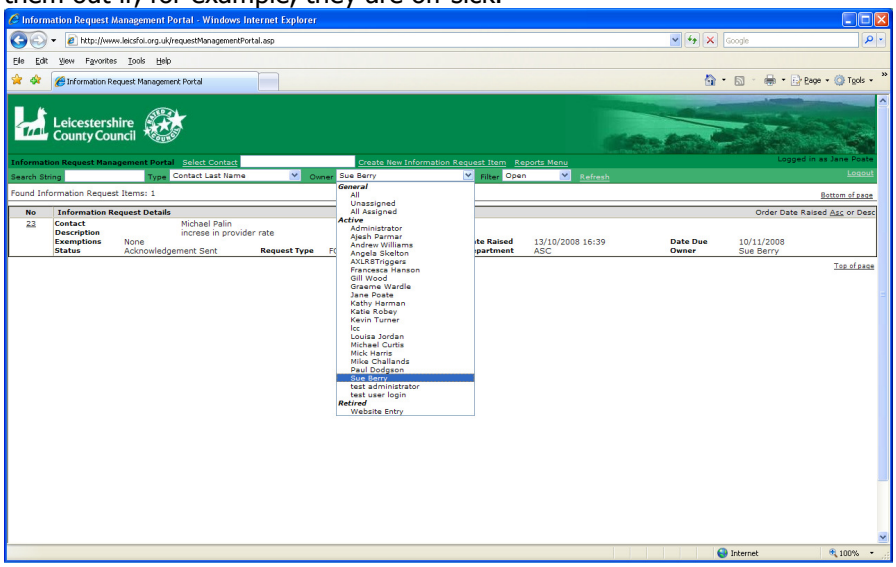
Once the new or exisiting individual has been selected, you can create a new information request and assign it to them by clicking on the **Create New Information Request Item** link on the middle of the to row under the banner, next to where you selected the individual. The resulting new **Information Request Details** dialogue screen, (which is explained in the appropriate section of this manual) will then appear for you to select the type of request, an owner, the department responsible, any exemptions, etc.

Award winning systems for fast moving businesses



9.4 looking at other colleagues' lists

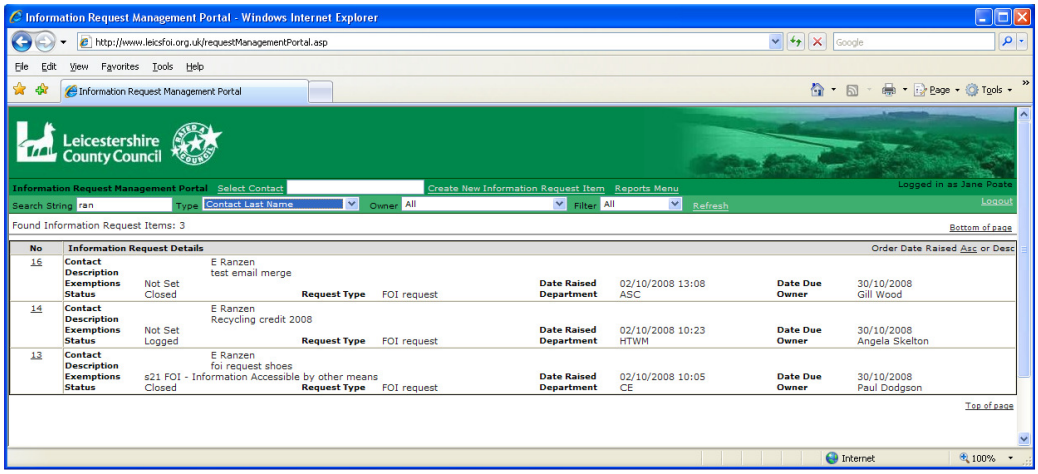
You can, if you have been authorised, look at the list of a colleague in order to help them out if, for example, they are off sick.



9.5 Searching for previous answers

There are facilities for searching for different names and subjects as shown on this screen shot. If you remember a person's name or some key word, you should find it quite intuitive. In the case below, we have looked for all queries for "E Ranzen", regardless of whether they are closed or open or by whom they were answered.

Award winning systems for fast moving businesses


Information Request Management Portal - Windows Internet Explorer
http://www.leicsfoi.org.uk/requestManagementPortal.asp
File Edit View Favorites Tools Help
Information Request Management Portal
Leicestershire County Council
Information Request Management Portal Select Contact Create New Information Request Item Reports Menu
Logged in as Jane Poate
Search String ran Type Contact Last Name Owner All Filter All Refresh
Logout
Found Information Request Items: 3
Bottom of page
No Information Request Details
Order Date Raised Asc or Desc
16 Contact E Ranzen
Description test email merge
Exemptions Not Set Request Type FOI request Date Raised 02/10/2008 13:08 Date Due 30/10/2008
Status Closed Department ASC Owner Gill Wood
14 Contact E Ranzen
Description Recycling credit 2008
Exemptions Not Set Request Type FOI request Date Raised 02/10/2008 10:23 Date Due 30/10/2008
Status Logged Department HTWM Owner Angela Skelton
13 Contact E Ranzen
Description foi request shoes
Exemptions s21 FOI - Information Accessible by other means Request Type FOI request Date Raised 02/10/2008 10:05 Date Due 30/10/2008
Status Closed Department CE Owner Paul Dodgson
Top of page
Internet
100%

This search facility will save you a great deal of time ”reinventing the wheel” when answering queries from people. Hopefully, it will avoid wasted time repeating the collection and collation of documents if the same hours of research and some of the the same resulting documents can be reused in similar queries.

Award winning systems for fast moving businesses